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Award-Winning Newsletter

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State Overview

JOB SERVICE ACTIVITY

Many of the Job Service activities are reported on the state fiscal year rather than the federal fiscal year, which is October 1 - September 30. The state fiscal year is from July 1, 2000, through June 30, 2001. The current state fiscal report recently was released. Highlights include:

- New Applications - 97,885, up 6.7 percent
- Nonagricultural Job Openings - 76,078, down 7.8 percent
- Nonagricultural Job Placements - 27,543, down 14.2 percent
- Agricultural Placements - 1,099, down 6.5 percent
- Regular Initial Claims - 108,274, up 9.4 percent
- Weeks Claimed - 674,801, up 12.6 percent
- Weeks Compensated - 585,788, up 12.4 percent
- Dollars Paid - \$120,906,470, up 20.2 percent
- Average Weekly Benefit Amount - \$206.40, up \$13.47
- Trust Fund End-of-Year Balance - \$316,435,787, down from \$321,782,807

The softening of Idaho's economy is reflected in the changes in the activity report. The number of applicants, or job seekers, is up but the number of job openings is down. In other words, there are more people looking for jobs than there are jobs.

Another indicator of the slowing economy is the increase in the Unemployment Insurance claim activity, especially during the last six months of the fiscal year. Reports show that between January and June 2001, there were 387,950 weeks compensated, up from 327,884 reported for January through June 2000—an 18.3 percent increase. The period of April through June 2001 experienced a 34.1 percent increase over the same period in 2000. The dollars paid out in benefits shows the same trend. During the period of January to June 2001, there was \$81,070,183 paid out in benefits compared to \$64,262,990 paid out for the same period in 2000—a 26.1 percent increase. The April through June 2001 period experienced a 43.1 percent increase in dollars paid. The significant increase during second quarter coincides with the layoffs in the electronics industry. These tend to be higher paid jobs, thus the amount of the benefit would be larger.

With the old fiscal year-end statistics on a downturn, it means the new fiscal year is starting out with many concerns and questions. How long will the downturn continue? Will the economic slowdown turn into a recession? Will the trust fund be adequate? Will the number of jobs available remain below the number of people looking for work? It will take several months before answers to these questions will be available. What we do know is that in the midst of the economic slowdown, the number of new jobs continues to grow, although at a much slower rate.

LABOR FORCE DEVELOPMENTS

Labor force details for the state, labor market areas, counties, and major cities can be found on State Table 1 on page 3.

Following an anomaly in August, the seasonally adjusted unemployment rate for September 2001 increased three-tenths of a percentage point to 4.9 percent. The

current unemployment rate is one-tenth of a percentage point above the 4.8 percent rate experienced one year ago, and it is the same as the national unemployment rate, which was unchanged from August at 4.9 percent.

Because of the timing of the reference week that determines both employment and unemployment levels, it is likely that the events of September 11 had little effect on the September unemployment rate. Job losses related directly or indirectly to the events of September 11 should begin to be reflected in the October and November employment data.

The number of unemployed persons in Idaho increased to 33,600 in September, up 2,000 from August. The increase in unemployment was primarily in the *Manufacturing and Services* sectors, which have been impacted by layoffs in the electronics and tourism industries. The number of employed persons decreased by 900 to 654,100. These changes resulted in a record high Civilian Labor Force of 687,700 in September, up 1,100 from August 2001.

The changes in Idaho's labor force from August 2000 show an increase of 26,200 persons, or 4.0 percent. Year-over-year, the total number of persons employed was up 24,600—3.9 percent—and the number of persons unemployed increased by 1,600, or 5.0 percent. See Table 3: Economic Indicators on page 6.

AREA LABOR FORCE HIGHLIGHTS

Labor force statistics are calculated for eight multi-county Labor Market Areas (LMA). The LMAs and their component counties are listed in State Table 1. The eight LMAs include: Boise City Metropolitan Statistical Area (MSA), Pocatello City MSA, Bonneville LMA, Cassia-Minidoka LMA, Idaho-Lewis LMA, Magic Valley LMA, Panhandle LMA, and Seaport LMA.

While the statewide September unemployment rate is below 5.0 percent, the unemployment rates for some of the labor market areas remain high. The Idaho-Lewis LMA once again had the highest unemployment rate at 8.0 percent, seasonally adjusted. The current rate is above August's 7.8 percent but below the 10.4 percent experienced in September 2000. Although less than 650 people were unemployed in this two-county area, the high rate is consistent with the persistent economic condition in this area that is heavily dependent upon the forest products industries.

Another northern Idaho LMA with a high unemployment rate in September was the Panhandle region at 7.6 percent, seasonally adjusted. In August the Panhandle unemployment rate was 6.8 percent, eight-tenths of a percentage point below the current rate. However, in September 2000 the unemployment rate was 8.9 percent. The five northernmost counties of Idaho comprise this region. The Panhandle LMA has the second largest civilian labor force of all LMAs. This region is quite dependent upon forest products industries as well as mining. Both of these industries have experienced substantial layoffs during 2001.

The state's largest LMA, Boise City Metropolitan Statistical Area (MSA), has not had the lowest unemployment rate in a LMA since March. The September seasonally adjusted unemployment rate for the Boise MSA was 4.2 percent, up from 3.9 in August and 3.2 percent in September 2000. While this is not an extremely high unemployment rate, the large number of layoffs in the electronics industry since March has had a dramatic impact on the rate. The unemployment rate was at its lowest level in January at 2.8 percent, 1.4 percentage points below the current level.

The Bonneville LMA, which includes Bingham, Bonneville, Butte, and Jefferson counties, had an unemployment rate of 3.9 percent in September. This LMA has experienced the lowest unemployment rate among LMAs since April 2000 when the Boise MSA rate began to increase because of the numerous layoffs in the area.

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The Seaport and Magic Valley LMAs also had unemployment rates below 4.0 percent in September. The Seaport LMA's seasonally adjusted unemployment rate in September was 3.9 percent, up from 3.7 percent in August but down from 4.9 percent in September 2000. The Magic Valley LMA experienced a 3.8 percent seasonally adjusted unemployment rate in September. This rate was higher than the 3.0 percent experienced in August but below the 4.4 percent experienced in September 2000.

COUNTY LABOR FORCE HIGHLIGHTS

During September, there were 23 counties that had a seasonally adjusted unemployment rate greater than the state rate of 4.9 percent. There were two counties—Bear Lake and Cassia—that had an unemployment rate equal to the state. There were 19 counties that had an unemployment rate less than the 4.9 percent state rate.

Four of the twenty-three counties experienced double-digit unemployment rates in September. Clearwater once again had the highest unemployment rate at 13.9 percent, which is up from 13.7 percent in August but down from 23.6 percent in September 2000. It was one year ago that Potlatch closed its Jaypee sawmill in Pierce which had a dramatic effect on an already high unemployment rate.

The other three counties with double-digit unemployment rates are: Shoshone at 11.3 percent, which is down four-tenths of a percentage points from August; Payette at 11.2 percent, which is down 1.6 percentage points; and Adams at 10.8 percent, which is up five-tenths of a percentage point. The double-digit unemployment rate in Payette County in August and September was because of a general slowdown in the manufacturing, construction, and trucking sectors.

Of the counties with unemployment rates below the state rate, seven experienced unemployment rates at or below 3.0 percent. Those seven were: Madison at 1.9 percent, which is up three-tenths of a percentage point from August; Teton at 2.3 percent, which is down two-tenths of a percentage point from August; Blaine at 2.5 percent, which is unchanged from August; Oneida at 2.7, which is down one-tenth of a percentage point from August; Butte at 2.8, which is down three-tenths of a percentage point from August; Jefferson at 2.9, which is down one-tenth of a percentage point from August; and Bonneville at 3.0 percent, which is up three-tenths of a percentage point from August.

EMPLOYMENT BY INDUSTRY

Nonfarm Payroll Jobs, shown in State Table 2 on page 5, increased 0.7 percent—3,800 jobs—to 576,700 in September. *State & Local Government* sectors accounted for the largest increase in the number of jobs from August. Local Government Education accounted for 4,800 new jobs and State Government Education accounted for an additional 1,700 new jobs. From September 2000, the number of nonfarm jobs increased by only 2,800 jobs, up 0.5 percent. Services accounted for the largest growth from last year, up 3,600 jobs.

State Table 1: September 2001 Labor Force (preliminary)				
Seasonally Adjusted	Labor Force	Unemp.	% Unemp.	Total Emp.
Seaport LMA	34,456	1,328	3.9	33,129
Nez Perce County	23,119	816	3.5	22,303
Asotin County, WA	11,337	511	4.5	10,826
Boise City MSA	253,875	10,584	4.2	243,291
Ada County	183,567	6,856	3.7	176,711
Canyon County	70,308	3,728	5.3	66,580
Pocatello City MSA*	40,555	1,873	4.6	38,682
Bonneville LMA	83,371	2,846	3.4	80,525
Bingham County	22,823	1,034	4.5	21,789
Bonneville County	48,284	1,459	3.0	46,825
Butte County	1,644	46	2.8	1,599
Jefferson County	10,619	307	2.9	10,312
Cassia-Minidoka LMA	19,485	1,097	5.6	18,387
Cassia County	9,638	469	4.9	9,169
Minidoka County	9,847	628	6.4	9,219
Idaho-Lewis LMA	8,061	647	8.0	7,415
Idaho County	6,422	520	8.1	5,902
Lewis County	1,639	127	7.7	1,513
Panhandle LMA	92,371	7,052	7.6	85,318
Benewah County	4,472	397	8.9	4,075
Bonner County	17,894	1,272	7.1	16,622
Boundary County	4,665	388	8.3	4,276
Kootenai County	58,481	4,216	7.2	54,265
Shoshone County	6,859	778	11.3	6,081
Magic Valley LMA	47,227	1,777	3.8	45,450
Gooding County	6,568	215	3.3	6,353
Jerome County	8,849	332	3.8	8,517
Twin Falls County	31,810	1,230	3.9	30,580
Adams County	1,758	189	10.8	1,569
Bear Lake County	2,821	137	4.9	2,684
Blaine County	12,564	319	2.5	12,245
Boise County	2,364	122	5.2	2,242
Camas County	364	21	5.8	343
Caribou County	3,196	180	5.6	3,016
Clark County	483	23	4.8	460
Clearwater County	3,831	533	13.9	3,298
Custer County	2,204	131	5.9	2,073
Elmore County	9,690	681	7.0	9,010
Franklin County	5,059	174	3.4	4,885
Fremont County	4,261	212	5.0	4,049
Gem County	7,088	693	9.8	6,396
Latah County	14,677	502	3.4	14,175
Lemhi County	3,601	206	5.7	3,394
Lincoln County	1,915	68	3.6	1,846
Madison County	10,889	204	1.9	10,686
Oneida County	1,900	52	2.7	1,848
Owyhee County	4,558	197	4.3	4,361
Payette County	10,529	1,175	11.2	9,353
Power County	3,327	205	6.2	3,122
Teton County	3,603	82	2.3	3,521
Valley County	4,280	320	7.5	3,959
Washington County	4,661	452	9.7	4,209
State of Idaho	687,687	33,571	4.9	654,116
Idaho Cities				
Boise	116,576	4,353	3.7	112,222
Coeur d'Alene	20,669	1,155	5.6	19,514
Idaho Falls	29,895	958	3.2	28,937
Lewiston	19,695	610	3.1	19,085
Nampa	21,579	1,261	5.8	20,319
Pocatello	28,866	1,339	4.6	27,527
Twin Falls	16,730	698	4.2	16,032

* Pocatello MSA includes all of Bannock County.

Construction activity traditionally begins to slow in September. The number of jobs decreased 300 in September to 39,800. Significant job losses were experienced in *Special Trade Contractors* with a loss of 250 jobs and *Building Construction* with a loss of 100 jobs. The third major construction group, *Heavy Construction*, experienced an increase of 50 jobs, offsetting some of the job loss. Despite the slowdown in the economy and construction, the number of new jobs from September 2000 is up 300. The largest year-over-year increase was in *Heavy Construction*—up 600 jobs—which would include highway and road construction as well as other infrastructure. The large increase was offset by losses in *Building Construction* and *Special Trade Contractors*. This drop in new jobs is reflective of the slowdown in residential construction. The number of new jobs in the *Construction* sector will decrease steadily, as it normally does during the winter months, until March 2002.

Manufacturing was down 500 jobs from August to 76,400. Once again, the job loss can be attributed to *Lumber & Woods Products*—down 200 jobs to 11,100 jobs—and *Industrial & Commercial Machinery & Computer Equipment*—down 300 jobs to 9,700 jobs. The job losses in the lumber industry were split between the sawmills and modular home manufacturers. The losses were a result of fewer product orders. The *Industrial & Commercial Machinery & Computer Equipment* sectors continue to be affected by layoffs. Several companies announced layoffs in late August that would be reflected in September job count.

While the job loss in *Manufacturing* occurred in the *Durable Goods* sector, job gains were posted in the *Nondurable Goods* sector. The harvest of the 2001 potato and sugar beet crops resulted in an increase in the number of jobs at local food processing plants. Within *Food Processing*, new jobs were added in *Canned, Frozen, & Preserved Fruits, Vegetables & Specialty Products* (200 for a total of 10,000 jobs) and *Sugar & Confectionery Products* (100 for a total of 1,550 jobs). Drought conditions across southern Idaho resulted in an earlier harvest of potatoes and earlier prep work for the sugar beet harvest.

Astaris, a phosphate chemical processing plant located in Pocatello, announced in October that it would close in December. This announcement followed the layoff of 100 workers in June. The closure of Astaris will result in the loss of an additional 300 jobs in *Chemicals & Allied Products*.

Return-to-school activities accounted for most of the net job gain in the *Service-Producing Industries*. Private and public education sectors added 8,500 jobs in September. *State Government Education* increased by 1,700 jobs from August and *Local Government Education* increased by 5,400 jobs. Private education is included in the *Services* industry; unpublished data indicate private education increased by 1,400 jobs. All totaled there were 55,400 jobs involved in education during September, up from 46,900 in August and 53,700 in September 2000.

Other *Service-Producing Industries* that reported an in-

crease in jobs were *Transportation* (up 700 for a total of 18,600 jobs) and *Wholesale Nondurable Goods* (up 200 for a total of 17,100 jobs). The increase in these two sectors is related to harvesting and processing activities. Trucks haul the produce from the fields to the processing plant or to the fresh pack warehouses. These two activities resulted in an additional 100 jobs in *Motor Freight Transportation & Warehousing*, and 400 jobs in *Wholesale Trade Nondurable Goods – Fresh Fruits & Vegetables*. An additional 350 jobs were created in *Transportation – School Buses* with the start of schools' fall semesters and the increased need for bus drivers.

Tourism-related employment normally declines in September, and this year was no exception. *Eating & Drinking Places* employment was down 300 from August to 39,600, *Hotels & Other Lodging Places* was down 600 jobs to 8,800, and *Amusement & Recreation Services* was down 1,000 jobs to 7,200.

Retail Trade lost 1,000 jobs between August and September resulting in 111,300 jobs. *Food Stores* experienced the largest loss with 400 jobs. The majority of the job loss came from Albertson's as they experienced layoffs at their corporate headquarters and closed their Twin Falls store. The cutbacks are part of a cost saving effort by the corporation. There were only two *Retail Trade* sectors that experienced a job increase—*General Merchandise Stores* and *Apparel & Accessory Stores*—each of which added fewer than 100 jobs in September. The job loss in *Retail Trade* is not all related to the economic slowdown but is partly a result of seasonal downturns.

Business Services reported a loss of 400 jobs from August to 30,700. Half of the job loss occurred in the *Personnel Supply Services* as the demand for temporary workers experienced a seasonal decrease. The number of new jobs generally begins to increase in October as the demand for additional help during the holiday season begins. However, the slowdown in the economy may result in fewer temporary jobs this holiday season.

The loss of 600 jobs in *Local Government Administration* is directly related to the seasonal layoffs in irrigation, recreation, weed, and rodent control districts. In September there were 29,500 jobs in *Local Government Administration*.

The number of jobs in *Trade, Lumber & Wood Products*, and *Industrial & Commercial Machinery & Computer Equipment* are at least 800 jobs fewer than last year's levels. The primary contributors to the 1,300 new jobs in *Health Services* since September 2000 were *Offices & Clinics of Doctors of Medicine* (200) and *Hospitals* (1,000). The largest growth sector between September 2000 and September 2001 occurred in the *Health Services* sector with the addition of 1,300 jobs.

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State Table 2: Nonfarm Payroll Jobs

BY PLACE OF WORK	Sept 2001*	Aug 2001	Sept 2000	% Change From	
				Last Month	Last Year
Nonfarm Payroll Jobs**	576,700	572,900	573,800	0.7	0.5
GOODS-PRODUCING INDUSTRIES	118,500	119,400	119,300	-0.8	-0.7
Mining	2,300	2,400	2,600	-4.2	-11.5
Metal Mining	800	900	1,200	-11.1	-33.3
Construction	39,800	40,100	39,500	-0.7	0.8
Manufacturing	76,400	76,900	77,200	-0.7	-1.0
Durable Goods	47,000	47,600	47,800	-1.3	-1.7
Lumber & Wood Products	11,100	11,300	12,200	-1.8	-9.0
Logging	2,600	2,600	2,200	0.0	18.2
Sawmills & Planing Mills	3,800	3,900	4,600	-2.6	-17.4
Wood Buildings & Mobile Homes	1,000	1,000	1,300	0.0	-23.1
Other Lumber & Wood Products	3,700	3,800	4,100	-2.6	-9.8
Stone, Clay, Glass & Concrete Products	1,500	1,500	1,500	0.0	0.0
Fabricated Metal Products, exc. Machinery & Transportation Equip.	3,100	3,100	3,100	0.0	0.0
Industrial & Commercial Machinery & Computer Equipment	9,700	10,000	10,500	-3.0	-7.6
Electronic & Other Electrical Equip. & Components, Exc., Computer	15,700	15,700	14,600	0.0	7.5
Transportation Equipment	2,300	2,300	2,400	0.0	-4.2
Other Durable Goods	3,600	3,700	3,500	-2.7	2.9
Nondurable Goods	29,400	29,300	29,400	0.3	0.0
Food Processing	17,600	17,300	17,400	1.7	1.1
Canned, Frozen, & Preserved Fruits, Vegetables & Food Specialties	10,000	9,800	10,000	2.0	0.0
Paper Products	2,200	2,200	2,100	0.0	4.8
Printing, Publishing & Allied Products	5,300	5,400	5,500	-1.9	-3.6
Chemicals & Allied Products	2,100	2,300	2,300	-8.7	-8.7
Other Nondurable Goods	2,200	2,100	2,100	4.8	4.8
SERVICE-PRODUCING INDUSTRIES	458,200	453,500	454,500	1.0	0.8
Transportation, Communications, & Utilities	29,900	29,300	28,300	2.0	5.7
Transportation	18,600	17,900	17,700	3.9	5.1
Railroad	1,400	1,400	1,400	0.0	0.0
Motor Freight Transportation & Warehousing	10,700	10,600	10,500	0.9	1.9
Communications	7,100	7,200	6,600	-1.4	7.6
Electric, Gas, & Sanitary Services	4,200	4,200	4,000	0.0	5.0
Trade	143,600	144,600	146,200	-0.7	-1.8
Wholesale Trade	32,300	32,300	33,800	0.0	-4.4
Durable Goods	15,200	15,400	15,900	-1.3	-4.4
Nondurable Goods	17,100	16,900	17,900	1.2	-4.5
Retail Trade	111,300	112,300	112,400	-0.9	-1.0
Building Materials, Hardware, Garden Supply & Manuf. Home Dealers	6,600	6,800	6,800	-2.9	-2.9
General Merchandise Stores	13,800	13,700	13,600	0.7	1.5
Food Stores	19,300	19,700	20,100	-2.0	-4.0
Automotive Dealers & Gasoline Service Stations	12,400	12,500	12,300	-0.8	0.8
Eating & Drinking Places	39,600	39,900	39,500	-0.8	0.3
Finance, Insurance & Real Estate	23,700	23,900	23,700	-0.8	0.0
Banking	7,200	7,200	7,300	0.0	-1.4
Services	151,500	152,600	147,900	-0.7	2.4
Hotels & Other Lodging Places	8,800	9,400	8,900	-6.4	-1.1
Personal Services	4,300	4,300	4,300	0.0	0.0
Business Services	30,700	31,100	30,700	-1.3	0.0
Amusement and Recreation Services	7,200	8,200	7,500	-12.2	-4.0
Health Services	37,700	37,700	36,400	0.0	3.6
Hospitals	12,800	12,700	11,800	0.8	8.5
Engineering, Accounting, Research, Management, & Related Services	18,100	18,300	18,200	-1.1	-0.5
Government	109,500	103,100	108,400	6.2	1.0
Federal Government	14,500	14,700	14,400	-1.4	0.7
State & Local Government	95,000	88,400	94,000	7.5	1.1
State Government	28,400	26,600	28,200	6.8	0.7
Education	12,900	11,200	12,900	15.2	0.0
Administration	15,500	15,400	15,300	0.6	1.3
Local Government	66,600	61,800	65,800	7.8	1.2
Education	37,100	31,700	36,000	17.0	3.1
Administration	29,500	30,100	29,800	-2.0	-1.0

* Preliminary Estimate

** Estimates include all full or part time wage and salary workers who worked or received pay in the following industry groups during the pay period ending nearest the 12th of the month.

DATA PREPARED IN COOPERATION WITH THE BUREAU OF LABOR STATISTICS

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State Table 3: Economic Indicators

State Table C: Economic Indicators

	Sept 2001	Aug 2001	Sept 2000	% Change From	
				Last Month	Last Year
IDAHO LABOR FORCE ⁽¹⁾					
Seasonally Adjusted					
Civilian Labor Force	687,700	686,600	661,500	0.2	4.0
Unemployment	33,600	31,600	32,000	6.3	5.0
Percent of Labor Force Unemployed	4.9	4.6	4.8		
Total Employment	654,100	655,000	629,500	-0.1	3.9
Unadjusted					
Civilian Labor Force	691,200	695,100	665,000	-0.6	3.9
Unemployment	27,800	28,700	26,100	-3.1	6.5
Percent of Labor Force Unemployed	4.0	4.1	3.9		
Total Employment	663,400	666,400	638,900	-0.5	3.8
U. S. UNEMPLOYMENT RATE ⁽²⁾	4.9	4.9	3.9		
U.S. CONSUMER PRICE INDEX ⁽²⁾					
Urban Wage Earners & Clerical Workers (CPI-W)	174.8	173.8	170.4	0.6	2.6
All Urban Consumer (CPI-U)	178.3	177.5	173.7	0.5	2.6
AGRICULTURE					
Agriculture Employment	39,220	40,030	40,030	-2.0	-2.0
Operators	9,010	9,010	9,010	0.0	0.0
Unpaid Family	670	670	680	0.0	-1.5
Hired Workers	29,540	30,350	30,340	-2.7	-2.6
UNEMPLOYMENT INSURANCE					
Claims Activities					
Initial Claims ⁽³⁾	6,139	9,057	4,303	-32.2	42.7
Weeks Claimed ⁽⁴⁾	46,733	52,415	29,240	-10.8	59.8
Benefit Payment Activities⁽⁵⁾					
Weeks Compensated	37,696	42,134	23,730	-10.5	58.9
Total Benefit \$ Paid	8,114,364	8,669,856	4,698,348	-6.4	72.7
Average Weekly Benefit Amount	\$215.26	\$205.77	\$197.99	4.6	8.7
Covered Employers	40,216	40,235	38,952	0.0	3.2
Total Benefit \$ Paid During Last 12 Months ⁽⁴⁾	\$133,674,288	\$130,258,272	\$103,771,559	2.6	28.8

(1) Preliminary Estimate

(2) Source: U.S. Bureau of Labor Statistics

(3) Includes all entitlements/programs on Intrastate and Interstate Agent, New, and Additional Claims

(4) Includes all entitlements/programs, Intrastate and Interstate Agent

(5) Includes all entitlements/programs, Total Liable Activities

HOURS AND EARNINGS

	Average Weekly Earnings*			Average Weekly Hours			Average Hourly Earnings		
	Sept 2001	Aug 2001	Sept 2000	Sept 2001	Aug 2001	Sept 2000	Sept 2001	Aug 2001	Sept 2000
Mining	\$636.31	\$627.92	\$634.37	39.4	40.2	41.3	\$16.15	\$15.62	\$15.36
Construction	\$683.20	\$686.62	\$651.87	40.0	40.2	39.7	\$17.08	\$17.08	\$16.42
Total Manufacturing	\$597.91	\$584.44	\$561.33	38.8	38.0	38.5	\$15.41	\$15.38	\$14.58
Lumber & Wood Products	\$603.35	\$605.88	\$493.50	41.1	40.8	35.0	\$14.68	\$14.85	\$14.10
Food & Kindred Products	\$491.17	\$446.12	\$464.86	39.9	38.0	38.9	\$12.31	\$11.74	\$11.95
Communications	\$773.39	\$719.43	\$768.77	43.4	40.6	42.9	\$17.82	\$17.72	\$17.92
Electric, Gas, & Sanitary Services	\$804.28	\$774.11	\$915.62	39.6	38.9	40.3	\$20.31	\$19.90	\$22.72
Trade	\$342.77	\$328.58	\$309.91	30.2	30.2	29.6	\$11.35	\$10.88	\$10.47
Wholesale Trade	\$517.64	\$515.52	\$498.24	36.3	35.8	36.0	\$14.26	\$14.40	\$13.84
Retail Trade	\$296.87	\$279.94	\$259.19	28.6	28.8	27.9	\$10.38	\$9.72	\$9.29

DATA PREPARED IN COOPERATION WITH THE BUREAU OF LABOR STATISTICS

* These average earnings are computed on a gross basis and reflect changes in premium pay for overtime and late shift work as well as changes in basic hourly and incentive wage.



PANHANDLE

BENEWAH, BONNER, BOUNDARY, KOOTENAI, & SHOSHONE COUNTIES

EMPLOYMENT TRENDS

The Panhandle's seasonally adjusted unemployment rose from 6.8 percent in August to 7.6 percent in September, and the number of unemployed residents rose 13.7 percent from 6,200 to 7,050. That rise in unemployment resulted from the continued downturn in U.S. manufacturing, which began in the fall of 2000. The unemployment and employment statistics shown in Table 1 do not reflect the aftermath of the September 11 terrorist attacks. Labor force and employment statistics always are for the week containing the twelfth of the month. Residents who are employed any time in the week of the twelfth are counted as employed, even if they lose their jobs later in the week. Because the week containing the 12th of September 2001 started on Sunday, September 9, September's statistics do not reflect job losses caused by the September 11 attacks. Therefore, the first layoffs resulting from the attacks will show up in the October statistics.

The first Panhandle businesses dramatically affected by the September 11 attacks were tourism businesses that lost customers when stalled air traffic caused the cancellation of conventions. With many Americans afraid to fly in the first few weeks after September 11, the Coeur d'Alene Resort and other tourist facilities lost substantial business. By the end of September, many tourist businesses began laying off staff. Although tourism picked up a bit in October, it remained far below its normal October level.

One repercussion of the economic atmosphere created by September 11 was a huge decrease in lumber prices. As a result, several Panhandle mills experienced temporary shutdowns or staff reductions in October.

The economic downturn also wounded other manufacturing operations. Most of the Panhandle's largest manufacturers cut jobs after September 11. Furthermore, manufacturers became concerned about potential interruptions in production and services due to in-

Panhandle Table 1: Labor Force & Employment

	Sept 2001*	August 2001	Sept 2000	% Change From	
				Last Month	Last Year
INDIVIDUALS BY PLACE OF RESIDENCE					
Seasonally Adjusted					
Civilian Labor Force	92,370	91,660	90,500	0.8	2.1
Unemployed	7,050	6,200	8,090	13.7	-12.9
% of Labor Force Unemployed	7.6%	6.8%	8.9%		
Total Employment	85,320	85,460	82,410	-0.2	3.5
Unadjusted					
Civilian Labor Force	92,130	93,490	89,890	-1.5	2.5
Unemployed	5,190	4,590	5,870	13.1	-11.6
% of Labor Force Unemployed	5.6%	4.9%	6.5%		
Total Employment	86,940	88,900	84,020	-2.2	3.5
JOBS BY PLACE OF WORK					
Nonfarm Payroll Jobs**	69,630	70,470	69,213	-1.2	0.6
Goods-Producing Industries	14,350	14,850	15,361	-3.4	-6.6
Mining	720	770	1,030	-6.5	-30.1
Construction	4,980	5,360	5,410	-7.1	-7.9
Manufacturing	8,650	8,720	8,921	-0.8	-3.0
Lumber & Wood Products	4,150	4,180	4,240	-0.7	-2.1
All Other Manufacturing	4,500	4,540	4,681	-0.9	-3.9
Service-Producing Industries	55,280	55,620	53,852	-0.6	2.7
Transportation	1,730	1,770	1,747	-2.3	-1.0
Communication & Utilities	1,070	1,070	1,091	0.0	-1.9
Wholesale Trade	2,260	2,240	2,308	0.9	-2.1
Retail Trade	15,800	16,120	15,644	-2.0	1.0
Finance, Insurance & Real Estate	2,640	2,640	2,475	0.0	6.7
Service & Miscellaneous	18,510	19,380	17,399	-4.5	6.4
Government Administration	8,050	8,290	7,981	-2.9	0.9
Government Education	5,220	4,110	5,207	27.0	0.2

* Preliminary estimate

**Full- or part-time jobs of people who worked for or received wages in the pay period including the 12th of the month

creased security measures. Over the last decade, businesses have increasingly relied on just-in-time practices, so delays in shipping can cause major production delays. Also, many manufacturers are experiencing cost increases for security, insurance, and transportation.

The retail sector also was hit hard. Coldwater Creek, the mail-order catalog company which is Sandpoint's largest employer, saw its sales decline sharply in the weeks after the terrorist attacks. Retail stores throughout the Panhandle saw fewer customers in recent weeks. As a result, many stores that normally would be hiring for the Christmas season decided not to hire this October.

CEDU Educational Services, which operates Rocky Mountain Academy and other programs for teens in the Bonners Ferry area, saw a decline in enrollments as parents became afraid to let their children fly or were reluctant to be parted from their children.

Besides coping with the increased severity of the U.S. economic slowdown, businesses also are facing new challenges of helping their employees cope with grief and fear following the terrorist attacks and anthrax mailings.

The war on terrorism will create a few job opportunities. Security firms and computer security consultants have seen a tremendous increase in demand for their services. In addition, U.S. Customs and the U.S. Immigration and Naturalization Service have increased their staffs at the Canadian border, including the North Idaho ports at Eastport and Porthill.

North Idaho College (NIC) recently opened an institute to teach how to respond to terrorist incidents including hostage situations. The program also will help businesses determine how to make international travel as safe as possible for their employees. The institute is named the Fort Sherman Institute for Human Protection. In the 1800s, Fort Sherman was the Army fort next to the lake in Coeur d'Alene, where NIC's main campus now is located. The institute, located at NIC's Workforce Training Center in Post Falls, has been on the drawing boards since July. The terrorist attacks on September 11 convinced NIC officials to move up the opening of the institute.

Anti-terrorism training also is provided by The Backup Training Corp. in Coeur d'Alene. The Backup produces magazines and interactive courses on CD-Rom for law enforcement agencies. The company currently offers 25 courses and has plans for 25 more. Its major focus since September 11 is producing a course for law enforcement agencies on how to respond to terrorism. The Backup, located at 421 Coeur d'Alene Avenue, employs 40 people.

AREA DEVELOPMENTS

Bonner County

- Downtown Sandpoint's newest store, Main Street Music and Game, sells new and used guitars, drums, CDs, albums, tapes, artwork, and VCRs at 111 Main Street.
- Another new downtown Sandpoint business is Pend Oreille Mortgage, a residential mortgage lender at 318 Pine Street.
- Clean Step II recently opened at 1309 Oak Street in Sandpoint. The business, owned by David Egin, repairs and maintains copiers, fax machines, printers, and document shredders.

Kootenai County

- Center Partners, which opened a call center in Coeur d'Alene in March, employed 900 people by the end of October. The 48,000-square-foot call center at 1201 Ironwood Drive is overflowing, and Center Partners plans to start a second call center in a 29,000-square-foot building under construction at Riverbend Commerce Park in Post Falls. The second center could employ 300 people by early 2002 and may eventually employ 500 people. The addition of a new center would make Center Partners the largest private employer in Kootenai County. Jobs Plus, Kootenai County's highly successful economic recruitment organization, helped bring Center Partners to the county. Center Partners has been impressed by the quality and availability of labor in Kootenai County.

- C2 Bandwidth opened in October at 408 Sherman Avenue in downtown Coeur d'Alene. The bandwidth wholesaler buys bandwidth from AT&T and Sprint and sells it to Internet Service Providers, software developers, and other companies that need uninterrupted access to the Internet. Normally, these services aren't offered outside large cities. The existence of a bandwidth wholesaler could help North Idaho attract e-commerce businesses and other kinds of businesses requiring sophisticated technology networks, according to a Jobs Plus spokesperson. C2 Bandwidth currently employs three people.
- Spokane Cardiology PSC, a cardiology practice, plans to open a branch in a 2,300-square-foot space in the Interlake Medical Building at 700 Ironwood Drive in Coeur d'Alene by December. The branch, to be known as Kootenai Heart & Vascular Health, will employ one physician and four other people. The cardiology practice will complement Kootenai Medical Center's intended enhancement of its heart care services.
- Inland Northwest Bank will break ground on its new building at 2190 North Ironwood Place in Coeur d'Alene in November. When the building is completed in June the bank will move out of its current location at 622 Sherman Avenue.
- A Sylvan Learning Center opened at 408 West Haycraft in Coeur d'Alene in October. The center teaches reading, writing, math, and other skills to children from preschool through 12th grade. It also can help children learn how to do their homework better, and offers assistance preparing for the SAT and ACT college entrance exams.
- Coeur d'Alene recently welcomed these new businesses: Stuff & Things, a store selling silk flower arrangements, porcelain dolls, hand-crafted household decorations, and other gift items in the Fairgrounds Center at 4055 Government Way; All Breed K9 Academy, a dog-training institute at 728 North Fourth Street; Quigley's Café, offering breakfast and lunch in the former Tubbs Café on Mullan Avenue; All About Sports, selling new and used camping, backpacking, snowboarding, skateboarding, and golf equipment at 204 North Fourth Street; Dagny's Coffee Co., a drive-up stand serving coffee, fruit drinks, sandwiches, and salads at 1820 Northwest Boulevard; International Minute Press, an offset printing firm at 101 Ironwood Drive; Latte Lane Espresso at 1602 Sherman Avenue; Midtown Baking Co., a restaurant serving homemade bread, dessert, soups, and salads at 846 N. Fourth Street; and Shabby to Sheek, a frame shop in the Wiggett Mall downtown.

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SEAPORT

NORTH CENTRAL IDAHO: CLEARWATER, IDAHO, LATAH, LEWIS, & NEZ PERCE COUNTIES

EMPLOYMENT TRENDS

Seaport's seasonally adjusted unemployment rate increased in September to 3.9 percent from August's rate of 3.7 percent, as shown in Seaport Table 1. In September 2000, the rate was 4.9 percent. Total employment decreased in September by 350 month-over-month, which follows seasonal trends. Employment usually decreases in September because of a break between hiring seasons for recreation/agriculture and the winter hiring season for the holidays. However, compared to the same time last year, employment increased by 840.

In September, Seaport's *Nonfarm Payroll Jobs* increased by 260 from August 2001, and 430 from September 2000. September's increase month-over-month was due to normal seasonal fluctuation in *Government Education*. *Education* increases in September because of the return of school staffs to classrooms after the summer break. *Services* continued monthly gains in September, mainly in the *Health Care* sector. *Services* increased by 360 jobs year-over-year. It should be noted that September's numbers are preliminary. September labor force and *Nonfarm Payroll Jobs* data will be revised, as more data is available. In light of the September 11 events, revisions to September numbers may be significant.

SPECIAL TOPIC

Lumber production slips

Lumber production in nearly every western state declined modestly last year due to a slowing in the U.S. housing market, according to final 2000 state totals published by Western Wood Products Association (WWPA). Information is based on the association's annual survey of nearly 300 mills in 12 western states and Alaska. Production and estimated wholesale value for Idaho was 1.9 billion board feet. Overall, western lumber production in 2000 totaled 17.18 billion board feet, down 2 percent from 1999; however, it was the second highest annual production volume since 1992. Estimated wholesale value of western lumber was \$6.15 billion, compared to \$7.37 billion in 1999

Seaport Table 1: Labor Force & Employment
Nez Perce County, Idaho, and Asotin County, Washington

	Sept 2001*	August 2001	Sept 2000	% Change From	
				Last Month	Last Year
INDIVIDUALS BY PLACE OF RESIDENCE					
Seasonally Adjusted					
Civilian Labor Force	34,460	34,750	33,950	-0.8	1.5
Unemployment	1,330	1,270	1,660	4.7	-19.9
% of Labor Force Unemployed	3.9%	3.7%	4.9%		
Total Employment	33,130	33,480	32,290	-1.0	2.6
Unadjusted					
Civilian Labor Force	34,050	34,510	33,520	-1.3	1.6
Unemployment	1,010	1,070	1,250	-5.6	-19.2
% of Labor Force Unemployed	3.0%	3.1%	3.7%		
Total Employment	33,042	33,440	32,270	-1.2	2.4
JOBS BY PLACE OF WORK					
Nonfarm Payroll Jobs**	25,690	25,430	25,260	1.0	1.7
Goods-Producing Industries	5,290	5,310	5,090	-0.4	3.9
Mining & Construction	1,460	1,470	1,270	-0.7	15.0
Manufacturing	3,830	3,840	3,830	-0.3	0.0
Food Processing	120	80	120	50.0	0.0
Lumber & Wood Products	710	730	720	-2.7	-1.4
Paper Products	1,690	1,700	1,740	-0.6	-2.9
All Other Manufacturing	1,310	1,330	1,250	-1.5	4.8
Service-Producing Industries	20,400	20,120	20,170	1.4	1.1
Transportation	1,340	1,330	1,350	0.8	-0.7
Communications & Utilities	300	290	280	3.4	7.1
Wholesale Trade	940	940	990	0.0	-5.1
Retail Trade	5,090	5,170	5,210	-1.5	-2.3
Finance, Insurance, & Real Estate	1,370	1,370	1,390	0.0	-1.4
Services	7,280	7,200	6,920	1.1	5.2
Government Administration	1,810	1,930	1,810	-6.2	0.0
Government Education	2,270	1,890	2,220	20.1	2.3
*Preliminary Estimate					
**Full- or part-time jobs of people who worked for or received wages in the pay period including the 12th of the month					

and \$6.11 billion in 1998.

After reaching a record 54.3 billion board feet in 1999, U.S. consumption dipped slightly in 2000 to 53.9 billion board feet. A 4.4 percent decline in the number of new homes accounted for much of the decrease in lumber consumption. Housing starts totaled 1.57 million units in 2000, down from 1.64 million in 1999. Single-family housing, the largest market for lumber, declined 5.5 percent to 1.23 million units in 2000. Each new single-family home uses an average of 14,175 board feet of softwood lumber. It is expected that decreases will continue in 2001. Collateral damage from the decreases has affected business in North Central Idaho as several lumberyards and sawmills have cut payroll. One lumberyard in Clarkston, Washington, closed.

AREA DEVELOPMENTS

Idaho & Lewis Counties

- Nine organizations in Idaho County will be receiving nearly \$500,000 in community facility grants from the U.S. Department of Agriculture's

Rural Development project. Overall, nearly \$1.34 million was awarded for 24 projects in rural Idaho. Grant awards are as follows: a library expansion project (\$138,057) and a new public safety building (\$75,000) in Kamiah; completion of construction on a fire station building (\$18,000) and a library (\$10,000) in Koo-skia; remodeling of the library (\$9,625) and city hall (\$106,800) in Riggins; construction of a storage building for Tahoe Community First Responders in Koo-skia (\$26,538); and construction of new fire stations for Salmon River Rural Fire Department (\$89,300). In many cases, these grant funds are only part of the whole funding picture to be used to complete these projects, according to spokesman Dan Fraser, USDA Rural Development.

- King's Discount opened a Grangeville store in October. Business was brisk during the grand opening. "We were swamped all day long," said store manager Brad Olson. "I think the community accepted us well and were happy with what they saw." The new 14,000-square-foot store is located on the corner of E Street. King's operates 33 stores in the intermountain Northwest, and sells a range of products such as toys, clothing, hardware, and kitchen appliances.

Latah County

- Schweitzer Engineering Laboratories (SEL) in Pullman plans to spend the next 19 months researching ways to improve security and survivability of the power grid with the help of a \$775,000 grant from the National Institute of Standards and Technology, a sub-branch of the U.S. Department of Commerce. The project will include developing software equipment that is more sabotage resistant. Software equipment controls the majority of automation and communication of electric power stations. "We're saying the same thing post-September 11 that we did pre-September 11—that we're in the business of protecting the electrical power system," said Susan Fagan, director of public affairs at SEL. The University of Idaho and Washington State University will participate in the program.

Nez Perce & Asotin Counties

- Lumberman's, a Clarkston lumberyard that has been in business since 1981, is closing. "We have made several changes in the last year, including management changes, in an attempt to get the right formula. Regardless of what we did, the market didn't allow us to continue," said company officials. Asotin County's housing starts peaked at 102 in 1994 then dropped to 42 last year, contributing to the company's decision to close the lumberyard. The store's 17 full-time employees have been invited to apply for openings at any of the other 50 Lumberman's stores in Idaho, Washington, Oregon, and Arizona. The closest is in Spokane and Walla Walla, but there also are locations in Boise and Ontario, Oregon. Lumbermen's executives made

the decision about the Clarkston store before the World Trade Center attacks but didn't announce it until October. The Kamiah Lumberman's closed early this spring and then re-opened as Jacobs Lumber under different ownership.

- Spatial Dynamics, located at the Port of Wilma northwest of Clarkston, has entered into a partnership with OB One Global Limited, of Tukwila, Washington, to market People Portal II. The People Portal II is designed to prescreen airline passengers for nonmetal objects at a much faster rate than conventional airport detectors. The scanner recognizes all objects on people that aren't a part of their bodies and highlights those objects in red. Operators view a wire frame diagram on a computer screen of each individual. Unlike competing technologies, People Portal II doesn't show revealing, photographic images of individuals. Since September 11 Spatial Dynamics has received many inquiries from airports all over the world resulting in plans to move the product from the prototype to manufacturing stage.
- Safeway has applied for a building permit at the new Bedrock Plaza site on Thain Road in Lewiston. According to the permit, the store will be 58,000-square feet and is the largest style of store that the company builds. It will include a pharmacy, deli, and floral department, and a China Express, which is a fast food operation. Plans call for a "future tenant coffee shop," as well. The new store will face the new Home Depot, and backs up against Nez Perce Drive.
- Deranleau's, a long time business in Lewiston, is planning to build a new 18,000-square-foot store at 1901 19th Avenue, across from the Lewiston Center Mall. For many years, the appliance and home electronics store has been a fixture near the bottom of 21st Street. The business will relocate to the new 90-by-200-foot structure by next year. About 40 percent of the new space will be a showroom, and 60 percent will be used as a warehouse.
- Starbucks, the largest retailer of specialty coffee in the world, recently opened a store at 1325 21st Street in a new Lewiston strip mall. The new coffee house sells drip coffee, espresso, tea, pastries, whole bean coffee, and brewing equipment. Customers also can make their purchases at a drive-through window. The new business employs 13 workers.
- Lisa's Learning Center at 840 Main Street in Lewiston opened in October. The new store features hard-to-find learning toys, and also carries home-schooling supplies and materials for teachers.

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TREASURE VALLEY

ADA, ADAMS, BOISE, CANYON, ELMORE, GEM, OWYHEE, PAYETTE, VALLEY, & WASHINGTON COUNTIES

EMPLOYMENT TRENDS

The seasonally adjusted unemployment rate for the Boise City Metropolitan Statistical Area (MSA), which includes Ada and Canyon Counties, was 4.2 percent for September 2001, as shown in Treasure Valley Table 1. This rate was up three-tenths of a percentage point from the August 2001 rate of 3.9 percent, and up an entire percentage point from the September 2000 rate of 3.2 percent. The slowing economy and the increased number of layoffs in the area account for the increase in September's unemployment rate. The number of individuals employed increased from August to September by 1,100 individuals, while an increase occurred in the number of unemployed individuals, from 9,700 in August to 10,600 in September. There was a net increase in the

**Treasure Valley Table 2: September 2001
Seasonally Adjusted Labor Force Figures for
Southwest Idaho Counties**

	Civilian Labor Force	Number Unem- ployed	Percent Unem- ployed	Number Employed
Ada	183,567	6,856	3.7	176,711
Adams	1,758	189	10.8	1,569
Boise	2,364	122	5.2	2,242
Canyon	70,308	3,728	5.3	66,580
Elmore	9,690	681	7.0	9,010
Gem	7,088	693	9.8	6,396
Owyhee	4,558	197	4.3	4,361
Payette	10,529	1,175	11.2	9,353
Valley	4,280	320	7.5	3,959
Washington	4,661	452	9.7	4,209
Statewide	687,687	33,571	4.9	654,116

Civilian Labor Force of 2,000 individuals from August to September 2001, and an increase of 14,400 individuals from one year ago. Treasure Valley Table 2 shows the September 2001 labor force figures for all counties in Southwest Idaho.

The number of *Nonfarm Payroll Jobs* increased by 500 from August to September 2001, and increased by 5,600 jobs since September 2000. Job decreases in *Fabricated Metal Products Manufacturing* (100), *Industrial & Commercial Machinery & Computer Equipment Manufacturing*

**Treasure Valley Table 1: Boise MSA Labor Force & Employment
Ada and Canyon counties**

	Sept 2001*	August 2001	Sept 2000	% Change Last Month	Last Year
INDIVIDUALS BY PLACE OF RESIDENCE					
Seasonally Adjusted					
Civilian Labor Force	253,900	251,900	239,500	0.8	6.0
Unemployment	10,600	9,700	7,700	9.3	37.7
% of Labor Force Unemployed	4.2	3.9	3.2		
Total Employment	243,300	242,200	231,800	0.5	5.0
Unadjusted					
Civilian Labor Force	251,700	253,900	237,800	-0.9	5.8
Unemployment	9,500	9,000	7,000	5.6	35.7
% of Labor Force Unemployed	3.8	3.6	2.9		
Total Employment	242,200	244,900	230,800	-1.1	4.9
JOBS BY PLACE OF WORK					
Nonfarm Payroll Jobs**	232,300	231,800	226,700	0.2	2.5
GOODS-PRODUCING INDUSTRIES	54,700	55,200	53,800	-0.9	1.7
Mining & Construction	18,200	18,200	16,600	0.0	9.6
Manufacturing	36,500	37,000	37,200	-1.4	-1.9
Durable Goods	28,100	28,600	28,600	-1.7	-1.7
Lumber & Wood Products	3,300	3,300	3,300	0.0	0.0
Wood Buildings & Mobile Homes	800	800	1,000	0.0	-20.0
Other Lumber & Wood Products	2,500	2,500	2,300	0.0	8.7
Fabricated Metal Products	1,100	1,200	1,300	-8.3	-15.4
Ind. & Comm. Mach. & Computer Equip.	6,600	7,000	8,100	-5.7	-18.5
Electronic & Other Elect. Equip. & Comp.	13,400	13,400	12,200	0.0	9.8
Transportation Equipment	1,800	1,900	1,700	-5.3	5.9
Other Durable Goods	1,900	1,800	2,000	5.6	-5.0
Nondurable Goods	8,400	8,400	8,600	0.0	-2.3
Food Products	5,600	5,600	5,700	0.0	-1.8
Canned Cured & Frozen Foods	1,800	1,800	1,800	0.0	0.0
Printing, Pub & Allied Products	1,900	1,900	2,000	0.0	-5.0
Other Nondurable Goods	900	900	900	0.0	0.0
SERVICE-PRODUCING INDUSTRIES	177,600	176,600	172,900	0.6	2.7
Trans, Comm, & Public Util	12,300	12,100	12,200	1.7	0.8
Transportation	6,900	6,700	6,700	3.0	3.0
Comm & Elec, Gas & Sanitary Services	5,400	5,400	5,500	0.0	-1.8
Trade	57,400	58,100	56,700	-1.2	1.2
Wholesale Trade	13,500	13,800	13,700	-2.2	-1.5
Durable Goods	8,200	8,300	8,200	-1.2	0.0
Nondurable Goods	5,300	5,500	5,500	-3.6	-3.6
Retail Trade	43,900	44,300	43,000	-0.9	2.1
General Merchandise Stores	6,300	6,200	5,400	1.6	16.7
Foods Stores	7,200	7,500	8,000	-4.0	-10.0
Eating & Drinking Places	15,700	15,700	15,100	0.0	4.0
Other Retail Trade	14,700	14,900	14,500	-1.3	1.4
Finance, Insurance, & Real Estate	11,100	11,100	11,100	0.0	0.0
Services	62,200	62,300	59,600	-0.2	4.4
Business Services	15,000	15,200	15,500	-1.3	-3.2
Health Services	18,700	18,600	16,900	0.5	10.7
Hospitals	8,900	8,900	7,700	0.0	15.6
Eng., Acct., Res., Mngmt., & Related	4,700	4,800	4,500	-2.1	4.4
Other Services	23,800	23,700	22,700	0.4	4.8
Government	34,600	33,000	33,300	4.8	3.9
Federal Government	5,300	5,300	5,100	0.0	3.9
State Government	13,100	12,300	12,600	6.5	4.0
Education	4,500	3,600	4,300	25.0	4.7
Administration	8,600	8,700	8,300	-1.1	3.6
Local Government	16,200	15,400	15,600	5.2	3.8
Education	10,400	9,400	9,900	10.6	5.1
Administration	5,800	6,000	5,700	-3.3	1.8

* Preliminary Estimate

**Full- or part-time jobs of people who worked for or received wages in the pay period including the 12th of the month

(400) and *Transportation Equipment Manufacturing* (100) outpaced job gains in *Other Durable Goods Manufacturing* (100) to create a net decrease of 500 jobs month-over-month in *Goods-Producing Industries*. Year-over-year, *Goods-Producing Industries* gained 900 jobs with *Construction & Mining* (1,600), *Other Lumber & Wood Products Manufacturing* (200), *Electronic & Other Electrical Equipment & Components Manufacturing* (1,200), and *Transportation Equipment Manufacturing* (100) outpacing job losses in *Wood Buildings & Mobile Home Manufacturing* (200), *Fabricated Metal Products Manufacturing* (200), *Industrial & Commercial Machinery & Computer Equipment Manufacturing* (1,500), *Other Durable Goods Manufacturing* (100), *Food & Kindred Products* (100), and *Printing, Publishing & Allied Products* (100). The large decrease in the number of jobs in *Industrial & Commercial Machinery & Computer Equipment Manufacturing* is consistent with the number of layoffs that have occurred in that industry since January 2001.

Service-Producing Industries gained 1,000 jobs between August and September 2001. Job increases in *Transportation* (200), *General Merchandise Stores* (100), *Health Services* (100), *Other Services* (100), *State Government Education* (900), and *Local Government Education* (1,000) outpaced job losses in *Durable Goods Trade* (100), *Nondurable Goods Trade* (200), *Food Stores* (300), *Other Retail Trade* (200), *Business Services* (200), *Engineering, Accounting, Research, Management, & Related* (100), *State Government Administration* (100), and *Local Government Administration* (200) to create the net increase in the number of jobs in the Boise City MSA over the month. The majority of job increases occurred in *State and Local Government Education*, with schools starting back up in September. The number of jobs in *State and Local Government Administration* decreased in September because of the end of temporary summer work in several departments. Year-over-year, there was an increase of 4,700 jobs in *Service-Producing Industries*, with *Communication & Electricity, Gas & Sanitary Services*, *Nondurable Goods Trade*, *Food Stores*, and *Business Services*, the only industries to experience job losses. The most notable job gains over the year were seen in *General Merchandise Stores* (900), *Eating and Drinking Places* (600), *Health Services* (1,800) primarily *Hospitals* (1,200), and *Other Services* (1,100).

SPECIAL TOPICS

Metro Expo 2001

- The Boise Metro Chamber of Commerce held its annual Metro Expo in mid-October. The expo included 160 company exhibits and free professional development seminars. The Intermountain Venture Capital Forum was set for the last day of the Expo. Fourteen companies spent the day pitching ideas to individual investors and nearly a dozen venture capital firms.

Electronics Update

- Micron Technology, Inc., announced a cost-cutting campaign in mid-October that could result in layoffs. The company announced that there are no current plans to lay off workers, but that future layoffs were possible if the industry does not recover from its current slump. The company imposed another ten percent cut in executive salaries as part of the company's cost-cutting campaign, and reduced non-essential travel for employees. The Christmas holiday will be extended for employees who elect to use accrued vacation, take unpaid time off, or tap future vacation time. In addition to the cost-cutting measures that Micron is taking, Micron Chairman and CEO Steve Appleton announced that he would not receive any salary while Micron posts financial losses.
- Micron Technology jumped to number one as the top DRAM producer in the world. Analysts predict that the increase in market share will allow the company to take in huge profits when the market rebounds. Samsung was the top DRAM producer, but updated information shows that Micron had higher sales than any other competitor since 1998.
- MicronPC, now part of the Gores Technology Group, posted its first profit in two years. Even though computer sales remain down, MicronPC was able to turn a profit by trimming its workforce and streamlining expenses.
- MCMS laid off another 56 workers in late October. Declining business and the loss of its biggest client, Cisco, contributed to the layoff. No information was available about the type of jobs that were lost at the company. MCMS still has 590 employees. In early October, the U.S. Bankruptcy Court approved a \$49 million "debtor-in-possession" financing package that allows MCMS to continue day-to-day operations during the bankruptcy proceedings. The bankruptcy court also approved the bidding procedures for the sale of MCMS assets. MCMS already announced its intended sale to Manufacturers' Services Limited, a Massachusetts firm that intends to keep the Nampa plant open and retain most of its employees.

AREA DEVELOPMENTS

Boise City MSA

- Boise Cascade Corporation announced the re-branding of its name in early October. The company will retain its full name for legal activities, including financial trading, but will adopt "Boise" for its products and marketing materials. The company stated that the change will have a visual presentation that does a better job of telling what the company is and

what it does. The company is very diversified, and the office products and building materials distribution divisions account for more than half of the company's total sales. The name changeover will not be completed until the spring of 2002. The company also announced the construction of a \$65 million wood-plastic composite manufacturing plant in Elma, Washington. The construction of the plant started in April 2001, and will be completed by May 2002.

- Sears recently announced the elimination of 4,900 salaried jobs throughout the company, along with other cost-cutting measures, and announced a new merchandising strategy. The strategy, under the direction of new chief executive, Alan Lacy, is designed to regain ground lost to certain discount stores that have opened in recent years. The company did not say whether the job cuts would affect employees at any Treasure Valley locations. The company also recently completed a \$6 million remodeling project at its Boise Towne Square location that increased the retail space by 10,000-square feet, allowing for the addition of a new bedding department, a larger women's section, hearing aid sales, and the expanded hardware department: "Tool Territory." The remodel also allowed the store to increase its sales force by ten percent.
- Moxie Java has new owners, Rick and Stephanie Dean of Grangeville, who purchased the business from Jerome Eberharter. Both the Deans and Eberharter will work together to market and promote Moxie Java and White Cloud Coffee throughout the country. The Deans have said that the added exposure of Moxie Java could allow the company to open up as many as 300 stores across the country within the next few years.
- A new retail shopping center is opening in November near the Boise Towne Square Mall. The new center is located next to TGI Friday's near Emerald and Milwaukee, and has been developed as a "lifestyle center," which is a new concept that is designed to offer shoppers mall-type stores without getting in and out of the mall. The tenants in the shopping center will be David's Bridal, Mountain States Cellular, and Aaron Brothers Art Mart (scheduled to open in February). There also will be four additional tenants in the future.
- The Boise Factory Outlet Mall was sold in August to Canterbury Real Estate Services, Inc., a Portland-based real estate firm, for \$7.6 million. The purchase did not include Idaho Ice World, but it did include six acres of undeveloped land west of the outlet mall. The company stated that it is negotiating with developers of a hotel that may take 2.5 acres of the

available land; if the deal goes through, construction on the hotel could begin in spring 2002. Three more pad sites on the six acres are under negotiations for a possible bank and national fast-food company. Improvements at the outlet mall are scheduled for the future, and may include a food court and daycare center. Opening in October at the outlet mall were catalog retailer Harry & David and Eddie Bauer.

- Construction started on the Orthopedic Center of Idaho in August. The 9,000-square-foot medical facility is located at River and 14th Streets in Boise and will include two operating rooms, one procedure room, and a six-bed recovery area. The building is being developed by several Boise-area orthopedists. The project should be completed by February 2002.
- Recent business openings in Boise include American Geotechnics, Inc., at 5260 Chinden Boulevard. The company specializes in providing geotechnical engineering, environmental services, and materials testing. American Auto Wholesale and Starr Tooling, which sells used automobiles and custom manufactures small machine parts, moved from Canyon County and leased 1,600 square feet at 5579 Overland Road in Boise. Tait & Associates are opening an architecture, engineering, environmental, and construction services office at 404 South Eighth Street, Suite 310. Syringa Networks, a statewide telecommunications network firm, has leased 6,286-square feet of space in the Airport Business Center at 3795 South Development Way in Boise. The Diamond Development Center opened a training center at 1350 Vista Avenue in Boise. Ashton's Framing and Fine Art opened at the corner of Eagle Road and Chinden Boulevard next to the City Market Place. MelloDee's Child Center, operated by the Community House, opened recently in downtown Boise at 12th Street and Grand Avenue. Peterson Autoplex recently purchased the Chrysler franchise from Lithia Chrysler Plymouth of Boise as well as expanded its location at 9101 West Fairview Avenue in Boise. Rachel's Place, a retail store that carries all hand-made gifts and home décor items, recently opened in Meridian at 1233 East First Street. Eagle Vacuum and Home Décor opened at 360 East State Street in Eagle. The Eagle Historical Museum opened in mid-October at the old library building in Eagle. The Eagle United Methodist Church finished its renovation and expansion project on North Eagle Road.
- AutoZone, a national auto parts chain, recently announced plans to build an outlet in Caldwell. The company acquired all required permits in October, and is preparing to build a 7,300-square-foot building at the corner of Tenth Avenue and Belmont Street. A construction start date has not been set.

- Recent business openings and announcements in Canyon County include BC&T Prints, which opened its retail laser print store in Karcher Mall in October; Horizon Paint, which manufactures paint and coatings, opened its new store at 423 East Karcher Road in Nampa; Washington Trust Bank opened a new branch at 2200 North Cassia Street in Nampa; Walgreens announced plans to open a store in Caldwell; and the Church of Jesus Christ of Latter-day Saints opened its newest chapel in mid-October at Locust Lane, one mile west of 12th Avenue in Nampa.

Adams County

- The Council City Council has planned the construction of two new buildings at the business park, funded by a Rural Community Development Block Grant. The foundation work is expected to be completed this fall, with construction on the buildings starting in the spring.
- Wilson's West, a new dance club in Council, had its grand opening in early October. The dance hall is located in the center of Council's financial district and is accessed through a doorway in the west wall of Wilson's Lounge. The opening night featured a live band: Sparky Parks and the Aardvarks.

Elmore County

- The U.S. Air Force released an announcement in mid-October outlining its plans for a realignment of Mountain Home Air Force Base (MHAFB), which will result in a pure fighter wing. Within the next year and a half, the B-1s and the KC-135Rs will be reassigned to other bases. The Air Force will increase the number of maintenance personnel, and expand the current Control and Reporting Element to a Control and Reporting Center, which will create a shifting of personnel, but no reduction in the number of those stationed at MHAFB. Between 500 and 700 persons could be affected by the changes. The U.S. Air Force also announced that MHAFB has been identified as a likely location for F-22 Raptor fighters in the future. In related MHAFB news, several additional units have been deployed from the base in the past few weeks, but no information on the destination was released.

Payette County

- Woodgrain Millwork, Inc., based out of Fruitland, recently has announced the opening of a new plant in Los Angeles, Chile. The South American plant is expected to open in late 2002 and provide at least 300 jobs.

Valley County

- The Cascade Chamber of Commerce held its annual dinner auction in early October at the American Legion Hall in Cascade. More than 150 people attended the annual event and raised more than \$10,000 for community projects and scholarships. During the annual dinner auction, the Chamber kicked off its "Extreme Cascade" national and regional marketing campaign. The campaign, funded by an Idaho Travel Council grant in conjunction with the Cascade Chamber of Commerce, targets winter sports enthusiasts and recreational vehicle buffs. Half-page "Extreme Cascade, Adventure Gateway" ads will be featured in the November, January, and February issues of SnoWest Magazine. The Cascade Chamber website will provide a link to www.sledtherockies.org, which promotes the area, and the chamber will host a booth at related trade shows. The McCall and Cascade chambers have partnered in this venture in an effort to maximize their exposure by coordinating promotional and advertising efforts in promoting the entire Valley County area.
- In early October, the McCall Planning and Zoning Commission recommended the approval of a 130-foot cell phone tower to be built on Industrial loop in west McCall. The tower will be owned by Clear-shot Communications, and will be designed to hold four wireless communication antennas. It will be painted and fitted with safety lighting according to FAA guidelines.
- Three consultants recently have been appointed to leadership positions with the proposed WestRock resort on Lake Cascade. David Scott was appointed vice president of commercial operations of WestRock Associates, Dan Newman was appointed vice president of financial planning, and Hilary Smith was named natural resource specialist of the resort. Earlier this year, Valley County officials approved the WestRock master plan but the resort is still seeking a lease from the State Land Board on 2,100 acres of state land. The Idaho State Land Board discussed the proposed resort in a closed session in mid-October and did not set a date for future discussions of the proposed resort.

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MAGIC VALLEY

BLAINE, CAMAS, CASSIA, GOODING, JEROME, LINCOLN, MINIDOKA, & TWIN FALLS COUNTIES

EMPLOYMENT TRENDS

The September 2001 seasonally adjusted unemployment rate for the Magic Valley LMA was 3.8 percent. This was eight-tenths of a percentage point higher than August 2001, but six-tenths of a percentage point lower than September 2000. This very low unemployment rate indicates strong employment despite some signs of an economic slow down.

A 4.6 percent reduction in the number of *Nonfarm Payroll Jobs* from September 2000 to September 2001 indicates that South Central Idaho is following the trends in both the state and the nation toward economic downturn. However, strong employment numbers seem to support the contention that South Central Idaho is somewhat insulated from some of the more severe economic problems and that the local economy, while experiencing a slow down, is not as severely affected as other areas. Some reasons for this "insulation" are that the sectors that seem to be most severely impacted in the nation, and even in other parts of Idaho, are *Manufacturing*, particularly jobs in the high tech sector. With the exception of the newly announced Dell Computer technical support jobs that will positively impact the area in the next couple of months, South Central Idaho has very few technology and heavy manufacturing jobs. Most *Manufacturing* positions are in *Food Processing*, a stable sector.

Two major sectors that appear to be affected by both the economic downturn and the terrorist attacks on September 11 are *Services* and *Retail Trade*, which are down 8.6 percent and 6.4 percent respectively. These two sectors are most closely tied to consumer confidence and the spending of discretionary income. Tourism was already impacted by the drought situation because many natural attractions such as Shoshone Falls and Snake River tours were without suffi-

Magic Valley Table 1: Labor Force & Employment
Twin Falls, Jerome, and Gooding counties

	Sept 2001*	August 2001	Sept 2000	% Change From	
				Last Month	Last Year
INDIVIDUALS BY PLACE OF RESIDENCE					
Seasonally Adjusted					
Civilian Labor Force	47,230	47,020	46,600	0.4	1.4
Unemployment	1,780	1,410	2,060	26.2	-13.6
% of Labor Force Unemployed	3.8	3.0	4.4		
Total Employment	45,450	45,610	44,540	-0.4	2.0
Unadjusted					
Civilian Labor Force	48,300	48,410	47,590	-0.2	1.5
Unemployment	1,450	1,550	1,660	-6.5	-12.7
% of Labor Force Unemployed	3.0	3.2	3.5		
Total Employment	46,850	46,860	45,930	0.0	2.0
JOBS BY PLACE OF WORK					
Nonfarm Payroll Jobs**	37,440	37,120	39,240	0.9	-4.6
Goods-Producing Industries	7,730	7,860	7,910	-1.7	-2.3
Mining & Construction	2,140	2,250	2,150	-4.9	-0.5
Manufacturing	5,590	5,610	5,760	-0.4	-3.0
Durable Goods	770	850	780	-9.4	-1.3
Nondurable Goods	4,820	4,760	4,980	1.3	-3.2
Food Processing	3,750	3,650	3,910	2.7	-4.1
All Other Nondurable Goods	1,070	1,110	1,070	-3.6	0.0
Service-Producing Industries	29,710	29,260	31,330	1.5	-5.2
Transportation, Comm., & Utilities	2,440	2,370	2,910	3.0	-16.2
Wholesale Trade	2,280	2,330	2,280	-2.1	0.0
Retail Trade	8,060	8,120	8,610	-0.7	-6.4
Finance, Insurance, & Real Estate	1,210	1,220	1,320	-0.8	-8.3
Services	8,070	7,940	8,830	1.6	-8.6
Government Administration	3,670	3,800	3,860	-3.4	-4.9
Government Education	3,980	3,480	3,520	14.4	13.1

*Preliminary Estimate

**Full- or part-time jobs of people who worked for or received wages in the pay period including the 12th of the month

cient water to draw tourists to South Central Idaho, and consumers seem to be spending less. Therefore, the outlook for South Central Idaho continues to be an economic cooling, but at a slower pace than other areas of the state and the nation.

AREA DEVELOPMENTS

Twin Falls County

- Dell Corporation announced its intention to locate a technical support center in Twin Falls to begin operation in early 2002. The technical support center will initially employ 200-250 workers with the possibility of future expansion. The facility will be located in the recently vacated Albertson's building on Pole Line Road in north Twin Falls. This announcement was the culmination of many months of intensive negotiations between Dell, the City of Twin Falls, the College of Southern

Idaho, and the State of Idaho. Dell already has begun recruitment efforts, and the Magic Valley Job Service is centrally involved in the process. Job Service has hired several temporary employees and installed new telephone lines to accommodate the extra workload. The College of Southern Idaho will be assisting with training and recruitment, and has developed new classes for persons interested in entering the computer/technical job market. Dell is hoping to have the technical center staffed and running early in 2002.

- The new Veterans Administration community-based outpatient clinic in Twin Falls is nearing completion and is expected to open November 5, 2001. The 4,000-square-foot facility is located at 260 Second Avenue East in Twin Falls. The VA opened its outpatient facility in June 2000 in a rented space, and patient load has increased from 400 to 1,500 veterans. The new facility is double the size of the existing rented space.
- The Historic Old Towne business improvement district has hired Richard Crowley as its new Executive Director. Mr. Crowley, who owns Crowley's-the Quad in the Magic Valley Mall and Crowley's Soda Fountain and General Store in downtown Twin Falls, earned a bachelor's degree in business management from Brigham Young University and spent six years with WordPerfect Corp. and Novell Corp. as regional manager. Before returning to Twin Falls, Mr. Crowley spent two years as facility administrator and assistant administrator for Ara Living Centers.
- Five more employers have adopted drug-screening policies to join the growing number of local businesses in the Magic Valley Drug-Free Workplace Project. The newest members are: K&T Steel Corporation in Twin Falls; St. Benedicts Family Medical Center in Jerome; Lamb-Weston, Inc., in Twin Falls; Mueller Auto Inc., in Twin Falls; and S&G Produce Co. Inc., in Twin Falls. This brings the total to 77 local businesses and organizations that have taken a stand against drugs in the workplace.
- Magic Valley Regional Medical Center has bought the Twin Falls Clinic & Hospital's inpatient services. Some details, such as purchase price, are still being negotiated, but both sides have signed a binding resolution. Inpatient services that will be transferred to the control of the medical center include admissions, intensive care, a pharmacy, respiratory therapy, and support services and equipment. The agreement will not affect outpatient services or physicians' practices at the clinic. The clinic is presently licensed for 44 beds.

Jerome, Gooding, Camas, Lincoln, & Blaine Counties

- Glanbia Foods, Inc., announced plans for a \$5.6 million investment in its Gooding cheese operation that will increase milk-processing capacity from its current level of 5.5 million pounds of milk per day to 6.25 million pounds. Most of the investment will be for more ultra-filtration and reverse-osmosis equipment, and additional milk-receiving truck bays. The project will begin immediately, and Glanbia Foods expects to be able to use the additional capacity by March 31, 2002.

Cassia & Minidoka Counties

- The College of Southern Idaho announced a \$230,000 expansion of its nursing program in the Mini-Cassia area to include laboratory and clinical instruction for Licensed Practical Nurses (LPNs). The CSI branch in Burley has more than 60 students in a two-year Registered Nursing program, but its LPN program was offered only in Twin Falls. The expansion is in response to local shortages of LPNs. It is anticipated that about 20 students per year will participate in the Mini-Cassia program. Combined with the Twin Falls program, the college will graduate about 40 new LPNs per year. The new program will feature classes at the CSI branch in Burley. Students will train in laboratory methods at Minico High School's lab that CSI is equipping with a \$170,000 interactive video system for LPN students. The LPN training course lasts approximately one year. There is extremely high demand in the area for all nursing professions and an LPN can expect to make \$12 to \$13 per hour with full benefits.

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SOUTHEAST IDAHO

BANNOCK, BEAR LAKE, BINGHAM, CARIBOU, FRANKLIN, ONEIDA, & POWER COUNTIES

EMPLOYMENT TRENDS

The Pocatello Metropolitan Statistical Area's seasonally adjusted unemployment rate crept up two-tenths of a percentage point in September 2001 to 4.6 percent. Job losses in the area caused the increase. The number of unemployed individuals increased by 5.1 percent in September. The September 2001 unemployment rate also moved up slightly from September 2000, when it was 4.5 percent.

Despite recent job losses, the number of *Nonfarm Payroll Jobs* increased in September 2001 over August 2001. Increased jobs occurred in *Government Education* because schools opened in August for the 2001 school year. The *Goods-Producing Industries, Construction* and *Manufacturing*, lost 100 jobs in September. Construction jobs declined in *Building Contractors* and *Special Trade Contractors*, a normal decline because the busy construction season began its normal decline to a slower winter pace. *Manufacturing* jobs declined in all *Other Nondurable Goods* because of American Micro-Systems' (AMI) layoffs.

Jobs in the *Service-Producing Industries* increased by 1,010 in September. *Government Education* accounted for most gains, which were split between *State Government Education* (504) and *Local Government Education* (456).

Year-over-year, the number of *Nonfarm Payroll Jobs* declined by 560 jobs. *Manufacturing* experienced the largest job decline (430) because of major layoffs at AMI combined with small declines in several of the other manufacturing sectors. *Government Administration* experienced the highest job gains from September 2000 (130).

SPECIAL TOPIC

2000 Nonfarm Payroll Jobs

A final count of 2000 *Nonfarm Payroll Jobs* recently was released by the Idaho Department of Labor. Southeast Idaho gained 1,328 jobs between 1999 and

Southeast Idaho Table 1: Labor Force & Employment
Pocatello City MSA (Bannock County)

	Sept 2001*	August 2001	Sept 2000	% Change From	
				Last Month	Last Year
INDIVIDUALS BY PLACE OF RESIDENCE					
Seasonally Adjusted					
Civilian Labor Force	40,550	40,420	40,100	0.3%	1.1%
Unemployment	1,870	1,780	1,810	5.1%	3.3%
% of Labor Force Unemployed	4.6	4.4	4.5		
Total Employment	38,680	38,640	38,290	0.1%	1.0%
Unadjusted					
Civilian Labor Force	40,380	39,680	39,970	1.8%	1.0%
Unemployment	1,630	1,720	1,590	-5.2%	2.5%
% of Labor Force Unemployed	4.0	4.3	4.0		
Total Employment	38,750	37,960	38,380	2.1%	1.0%
JOBS BY PLACE OF WORK					
Nonfarm Payroll Jobs**	33,020	32,110	33,580	2.8%	-1.7%
Goods-Producing Industries	4,190	4,290	4,750	-2.3%	-11.8%
Mining & Construction	1,680	1,710	1,810	-1.8%	-7.2%
Manufacturing	2,510	2,580	2,940	-2.7%	-14.6%
Service-Producing Industries	28,830	27,820	28,830	3.6%	0.0%
Transportation, Comm., & Utilities	1,840	1,810	1,900	1.7%	-3.2%
Wholesale Trade	1,430	1,430	1,400	0.0%	2.1%
Retail Trade	6,940	6,860	7,130	1.2%	-2.7%
Finance, Insurance, & Real Estate	1,470	1,500	1,440	-2.0%	2.1%
Services	8,140	8,110	8,080	0.4%	0.7%
Government Administration	3,570	3,630	3,440	-1.7%	3.8%
Government Education	5,440	4,480	5,440	21.4%	0.0%

*Preliminary Estimate

**Full- or part-time jobs of people who worked for or received wages in the pay period including the 12th of the month

2000—a growth rate of 2.4 percent. Chart 1: Southeast Idaho Jobs (see page 18), shows the *Service* industry experienced the highest growth rate (9.8 percent) of all industry sectors, gaining 963 jobs. *Finance, Insurance & Real Estate* (4.4 percent), *Construction* (4.1 percent), *Government* (1.8 percent) and *Retail Trade* (1.1 percent) collectively added 365 jobs over the year. *Transportation, Communications & Utilities (TCU)* experienced the highest job loss rate (6.2 percent), losing 183 jobs. The remaining job losses occurred in *Wholesale Trade* (0.8 percent) and *Manufacturing* (0.3 percent), which lost 52 jobs collectively.

Bannock County (Chart 2, Page 18)

In Bannock County, *Nonfarm Payroll Jobs* increased 2.1 percent between 1999 and 2000 and added 673 jobs to the area economy. *Services* (808) experienced the highest job growth in the county with an 11.5 percent increase while *Construction* (212) suffered a job loss that resulted in an 11.4 percent decrease.

Bear Lake County (Chart 3, Page 18)

Between 1999 and 2000, the number of *Nonfarm Payroll Jobs* declined by 81 (5.0 percent). While most industries remained near the 1999 level, *Wholesale Trade* (109) drove overall job numbers down with a 68.6 percent decrease. *Construction* rebounded and gained eight jobs over the year, resulting in a 21.6 percent increase.

**Chart 1: SE Idaho Nonfarm 99-00
Percentage Change**

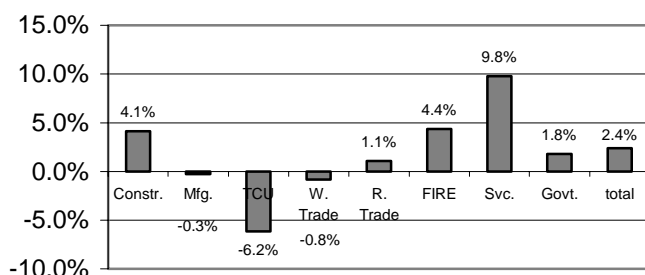


Chart 2: Bannock County 99-00

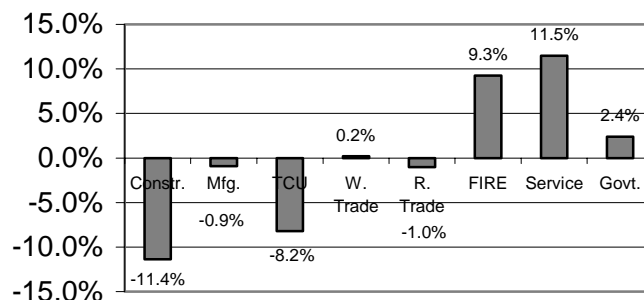


Chart 3: Bear Lake County 99-00

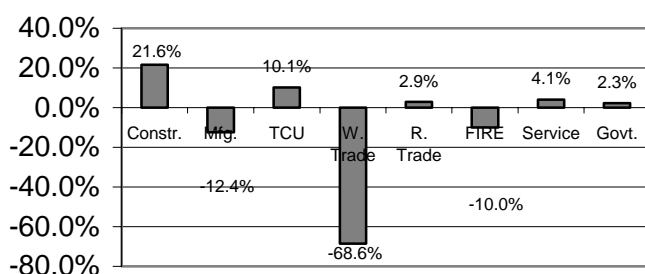
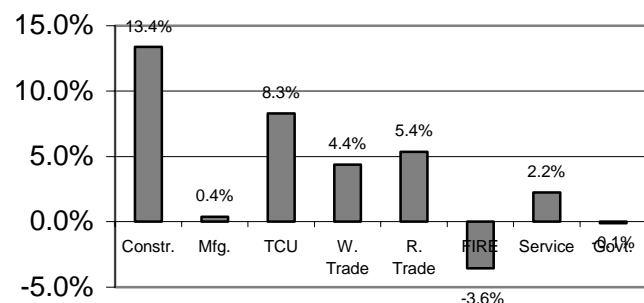


Chart 4: Bingham County 99-00



TCU=Transportation, Communications & Utilities; FIRE=Finance, Insurance & Real Estate; R Trade=Retail Trade; W Trade = Wholesale Trade

Bingham County (Chart 4, Page 18)

Nonfarm Payroll Jobs increased 2.6 percent between 1999 and 2000, and added 320 jobs in Bingham County. A combination of residential and commercial construction boosted Construction jobs by 82 over the year for a 13.4 percent increase. Reorganization of the Finance Industry reduced Finance, Insurance & Real Estate jobs by 11 for a 3.6 percent decrease.

Caribou County (Chart 5, Page 24)

Caribou County experienced job growth in every industry sector except Finance, Insurance & Real Estate, which lost one job over the year, resulting in a 1.6 percent decrease. Construction led job growth at an 13.4 percent increase, adding 27 jobs in 2000. All industry sectors gained because construction workers moved into the area to work on the Agrium Manufacturing facility, which spurred economic growth.

Franklin County (Chart 6, Page 24)

The number of Nonfarm Payroll Jobs increased 3.2 percent (74) in Franklin County in 2000. Transportation, Communications, and Utilities experienced the highest job growth—five jobs—for a 7.4 percent increase. Finance Insurance and Real Estate dipped 10.7 percent (nine jobs) because of reorganization of the Finance Industry.

Oneida County (Chart 7, Page 24)

Job gains slightly outpaced job losses in Oneida County, edging job growth up 0.5 percent (five jobs) in 2000. Wholesale Trade gained seven jobs over the year for a 43.8 percent increase, while Construction lost three jobs for a 18.2 percent decrease.

Power County (Chart 8, Page 24)

Power County Nonfarm Payroll Jobs increased 2.7 percent (100 jobs) from 1999–2000. Construction, which added 123 new jobs (an 81.5 percent increase), led job growth in the county. Transportation, Communications & Utilities lost 78 jobs over the year for a 20.3 percent decrease.

(Continued on page 24)

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NORTHEAST IDAHO

BONNEVILLE, BUTTE, CLARK, CUSTER, FREMONT, JEFFERSON, LEMHI, MADISON, & TETON COUNTIES

EMPLOYMENT TRENDS

The seasonally adjusted unemployment rate for the Bonneville Labor Market Area (LMA) increased three-tenths of a percentage point from August to September 2001, for a current rate of 3.4 percent. Much of this increase came from Bingham County's increase of seven-tenths of a percentage point month-over-month. Bingham County's September unemployment rate jumped to 4.5 percent. Bingham County is highly affected by agricultural activity, especially potato fresh-packing and processing. Some potato processing plants were still undergoing maintenance while some others were completely shut down awaiting harvest of the new crops during this time period. The LMA changed very little—an increase of one-tenth of a percentage point—from September of 2000.

The LMA's other three counties showed low unemployment rates for September: Bonneville County at 3.0 percent, Butte County at 2.8 percent, and Jefferson County at 2.9 percent. Idaho Falls, the largest city in the LMA, showed an unemployment rate of 3.2 percent, up three-tenths of a percentage point from the previous month and unchanged from September 2000.

Nonfarm Payroll Jobs increased 630 jobs month-over-month, for a total of 64,430 jobs in the LMA. *Goods-Producing Industries* increased 1,440 jobs month-over-month with *Manufacturing* increasing 1,240 jobs (*Nondurable Goods*) and *Construction* showing an increase of 200 jobs. *Food & Processing (Canned, Frozen & Preserved Fruits, Vegetables and Food Specialties)* showed the largest increase as processing plants in Bonneville and Jefferson counties started back into operation after annual maintenance layoffs. *Construction* jobs increased mainly in the *Special Trade Contractors* sector.

Service-Producing Industries decreased 810 jobs month-over-month. *Services* decreased 530 jobs, with *Membership Organizations* being a large contributor. Scout organizations add a large number of jobs for day and overnight camps for the

Northeast Idaho Table 1: Labor Force & Employment
Bonneville, Bingham, Butte, & Jefferson counties

	Sept 2001*	August 2001	Sept 2000	% Change From Last Month	Last Year
INDIVIDUALS BY PLACE OF RESIDENCE					
Seasonally Adjusted					
Civilian Labor Force	83,370	83,960	79,810	-0.7	4.5
Unemployment	2,850	2,580	2,600	10.5	9.6
% of Labor Force Unemployed	3.4	3.1	3.3		
Total Employment	80,520	81,380	77,210	-1.1	4.3
Unadjusted					
Civilian Labor Force	84,880	84,740	81,270	0.2	4.4
Unemployment	3,020	3,390	2,750	-10.9	9.8
% of Labor Force Unemployed	3.6	4.0	3.4		
Total Employment	81,860	81,350	78,520	0.6	4.3
JOBS BY PLACE OF WORK					
Nonfarm Payroll Jobs**	64,430	63,800	63,420	1.0	1.6
Goods-Producing Industries	11,710	10,270	9,480	14.0	23.5
Mining & Construction	5,360	5,160	4,310	3.9	24.4
Manufacturing	6,350	5,110	5,170	24.3	22.8
Food Processing	3,820	2,470	2,680	54.7	42.5
Ind. & Com. Mach. & Computer Equip.	490	510	570	-3.9	-14.0
All Other Manufacturing	2,040	2,130	1,920	-4.2	6.3
Service-Producing Industries	52,720	53,530	53,940	-1.5	-2.3
Transportation, Comm., & Utilities	2,410	2,350	2,370	2.6	1.7
Wholesale Trade	5,790	5,880	5,890	-1.5	-1.7
Retail Trade	10,950	11,410	11,680	-4.0	-6.3
Finance, Insurance, & Real Estate	1,860	1,910	1,870	-2.6	-0.5
Services	21,410	21,940	21,510	-2.4	-0.5
Government Administration	5,760	5,910	5,820	-2.5	-1.0
Government Education	4,540	4,130	4,800	9.9	-5.4

*Preliminary Estimate

**Full- or part-time jobs of people who worked for or received wages in the pay period including the 12th of the month

month of August only. *Retail Trade* also decreased noticeably in the sectors of *Eating & Drinking Places* and *Miscellaneous Retail*. School start-ups and an end to the tourist season are both factors that traditionally contribute to such changes. *Transportation* increased in the *Service-Producing Industries* month-over-month thanks to the *Motor Freight Transportation & Warehouse* sector. The only other increase was *Government Education* as school started back into session.

A year-over-year glance shows an overall increase of 1,010 *Nonfarm Payroll Jobs*, thanks to the *Goods-Producing Industries*. *Construction (Special Trade Contractors)* increased 1,050 jobs while *Manufacturing (Food Processing)* increased 1,140 jobs. *Service-Producing Industries* decreased 1,220 jobs, largely in *Retail Trade—Eating & Drinking*, and *Local Government—Education*. Several smaller restaurants have gone out of business due to calamities and/or retirements over the year. A tight unemployment rate also has taken a toll on some fast food businesses because finding sufficient labor has been challenging. Education jobs have been affected by the ever-changing school-age population in each district, and the jobs have fluctuated accordingly.

AREA DEVELOPMENTS

Bonneville County

- FamilyFlicks, a G-rated family store, opened at 2125 West Broadway in Idaho Falls. The store, located in Madsen's Ben Franklin Craft Store, has more than 300 videos edited to cut out portions that might be considered offensive. The public can find both recent blockbusters and old-time favorites. Customers interested in membership must pay a membership fee to join the club. Business hours are 3:30 p.m. - 8 p.m. Monday through Thursday and 3:30 p.m. - 9 p.m. Friday and Saturday.
- Edited Videos also opened in Idaho Falls at 1541 East 17th Street. Customers can bring in their own videos and have them edited to cut out parts they find offensive. For a membership fee, they also can check out versions of edited movies. John Marlowe of Rexburg opened the store in August. The store's number is 552-3345.
- Gretel's Gifts closed at the end of September. The Idaho Falls store was located at 478 Shoup Avenue. Owner Dick Clayton, 82, decided to retire. The store had been in operation for 35 years and was well-known for its personalized services of gift-wrapping and no-charge deliveries.
- In October, Idaho Falls was the site of an international conference on cleaning up a nuclear waste storage site 300 miles north of the Arctic Circle (Russia's Andreeva Bay). The U.S. Department of Energy initiated the invitation, and representatives from eight countries met to discuss stabilization of the site. Andreeva Bay was the Soviet Union's nuclear submarine support base until 1984, but became a nuclear waste storage site since that time. Recommendations generated from the conference workshops will be discussed by a group of experts at a meeting scheduled in Sweden this month. Cleaning of the site will take an international effort. The United States, the Russian Federation, Norway, Finland, Sweden, The Netherlands, the United Kingdom, and France were all represented.
- Changes are taking place at Idaho Fall's Bonneville Museum. A renovation project is adjoining two buildings in front of the busy intersection of Broadway and Yellowstone in Idaho Falls. The project is ahead of schedule. A newly-constructed glass wall will link the existing museum to the newly-renovated building which is the former Masonic Temple. The \$3 million project will continue through the winter once the glass is in place. The expansion triples the size of the museum to 30,700-square feet and makes it entirely accessible to people with disabilities. The expansion is part of a plan for furthering educational programs and creating expanded exhibits at the museum. Because of its location, exhibits, and new aesthetics, the museum is anticipated to be a prominent

tourist attraction. A grand opening in late fall or early winter 2002 is expected.

Lemhi County

- Granny's Steak House in Salmon caught fire in September and burned. The fire was caused by grease in the kitchen that could not be contained. Everyone was evacuated safely, but the building was condemned and the owner has no plans to rebuild.
- The Lemhi Historical Society received a check for \$13,888 for improvements to the Lemhi County Historical Museum on Main Street in Salmon. The monies are part of the Governor's Bicentennial Museum Initiative. Of the \$500,000 appropriation to assist groups involved with "The Idaho Governor's Lewis and Clark Trail Committee," \$125,000 was earmarked to be used specifically to assist the non-federal museums along and adjacent to the Lewis and Clark Trail. A sign in front of the museum already advertises a new phone number for the updated phone system that currently is being installed.
- A dedication program celebrating the future building of the Sacajawea Interpretive, Cultural and Education Center was held October 20, in Salmon. Earlier in the year, the Lemhi Shoshone elders requested the dedication to honor Sacajawea and other ancestors. It took place at the 71-acre Sacajawea Interpretive site on Highway 28 just east of the Salmon city limits. The dedication started with a Sunrise Blessing Ceremony led by Darrel Tendoy. The dedication included Native American music, cultural ceremonies, historical events, patriotic songs, and recognition of special visitors--Native American representatives from several tribes, congressional representatives, and the Lewis and Clark Bicentennial Committee. A luncheon followed at the WhiteWater Therapeutic Arena which included such foods as buffalo, salmon, and traditional Indian foods. Entertainment was provided by the Salmon Old Time Fiddlers.

Madison County

- Sugar City received a \$500,000 loan from the U.S. Department of Agriculture's Rural Development project. The loan will be used to increase wastewater treatment capacity and make road improvements. Currently, the city's sewer wastewater is treated at the Rexburg treatment plant. Part of the loan will help purchase additional capacity at the Rexburg plant which is needed to meet demands at Norsun, a potato treatment plant. Over the next 20 years, Norsun will repay the city. The remaining funds will be used to update seven miles of streets.

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FARMWORKER PREVAILING WAGE SURVEY

The Idaho Department of Labor recently completed its annual Farmworker Prevailing Wage Survey for 2001 for occupations that have been filled via the federal H-2A program. The H-2A program allows employers, who can demonstrate the need, to apply for temporary, non-immigrant alien workers to perform agricultural work of a seasonal or temporary nature.

A major purpose of the survey is to gather wage and salary information from random agricultural employers

to determine the prevailing or current market wage for temporary, seasonal farmworker occupations in specific areas of the state. For all H-2A job orders, the guaranteed hourly rate to be paid to *all workers performing similar work* must be the higher of the Adverse Effect Wage Rate (AEWR), Federal or State minimum wage, or applicable prevailing hourly wage rate. Developed by U.S. Department of Agriculture, the AEWRs were adopted by the U.S. Department of Labor to prevent the employment of aliens from adversely affecting the wages of similarly employed U.S. workers.

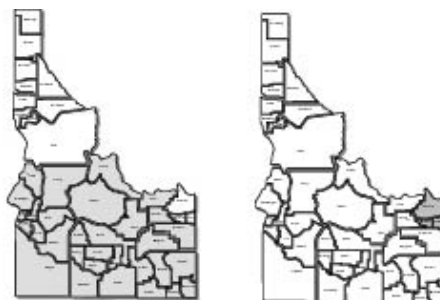
If performing piece rate work, the piece-rate wage shall be no less than the activity's prevailing piece-rate for that area. The worker must also be paid no less than the guaranteed hourly earning for the pay period. If the piece-rate earnings fall below the guaranteed hourly rate, the worker's pay must be supplemented to meet the guaranteed earnings at the end of the pay period.

Among the additional employer requirements necessary for program participation, all H-2A Job Orders must offer housing and, if a prevailing practice of employment, board as well, all at no cost to both U.S. and alien workers.

DROUGHT CONDITIONS

A second portion of this year's survey³ included questions designed to gain information about the economic impact of the drought this year. This year's extreme drought conditions had an adverse impact on the agricultural sector of Idaho's economy. Many reservoirs were below 50% capacity and the prospect of water throughout the entire growing season was bleak. Survey questions included Idaho Power buyback participation, change in crop rotation, alternative crops, and impact to the number of seasonal farmworkers hired.

Chart 1: Farmworker Prevailing Wages 2001



Dictionary of Occupational Title	Official Prevailing Wage Determinations for the 34 Counties	Official Prevailing Wage Determinations for the 3 Counties
Farmworker, Diversified	\$5.75 per hour	\$7.00 per hour
Farmworker, General I	\$6.50 per hour	no finding ²
Irrigator, 2-inch Hand Line	\$7.25 per hour	no finding ²
Irrigator, 3-inch Hand Line	\$6.00 per hour	no finding ²
Irrigator, 3-inch/ 4-inch Hand Line	\$0.141 per pipe + \$0.016 per pipe bonus (end of season)	no finding ²
Irrigator, 4-inch Hand Line	\$0.17 per pipe	\$0.13 per pipe + \$0.03 per pipe bonus (end of season)
Irrigator, 4-inch Wheel Line	\$3.95 per line	no finding ²
Irrigator, 4-inch/ 5-inch Wheel Line	\$6.79 per hour	no finding ²
Irrigator, 5-inch Wheel Line	\$5.75 per hour + \$0.25 per hour bonus (end of season)	no finding ²
Irrigator, Center Pivot	\$7.50 per hour + \$0.50 per hour bonus (end of season)	no finding ²
Irrigator, Drag Line	no finding ²	no finding ²
Irrigator, Drip System	no finding ²	no finding ²
Irrigator, Solid Set	\$6.79 per hour	no finding ²
Irrigator, Surface Flood	\$6.50 per hour	no finding ²

²Information certified and made official by the U.S. Department of Labor, Employment and Training Administration.

¹Past annual prevailing wage surveys have elicited *piece rate* pay methods for pipe or line moving duties within the irrigator occupation. Only after subsequent surveys in the coming years will we be able to identify if indeed the apparent trend towards hourly pay will continue.

²A prevailing wage survey capable of resulting in a prevailing wage finding could not be conducted due to insufficient number of employers employing domestic workers. Wage information from adjoining States or wage reporting area and/or prior surveys was also inadequate for purposes of making a 2001 prevailing wage determination for this activity.

³The annual prevailing wage survey was conducted to determine the prevailing wage rate that may be used as a minimum pay rate for U.S. and alien workers employed by H-2A employer participants. Farmers were randomly chosen from a large database compiled from multiple sources including the Idaho Department of Labor, Idaho Tax Commission, Idaho Potato Commission and the Western Stockman's Association. The sample size, sample distribution, and survey methodology follow the guidelines outlined in the Employment Training Administration Handbook 385.

The following charts reflect the information obtained from over 400 farms in 34 counties throughout Idaho, (Northern Idaho was not surveyed)⁴. The 34 counties make up four of the five Agricultural Areas (see map below).

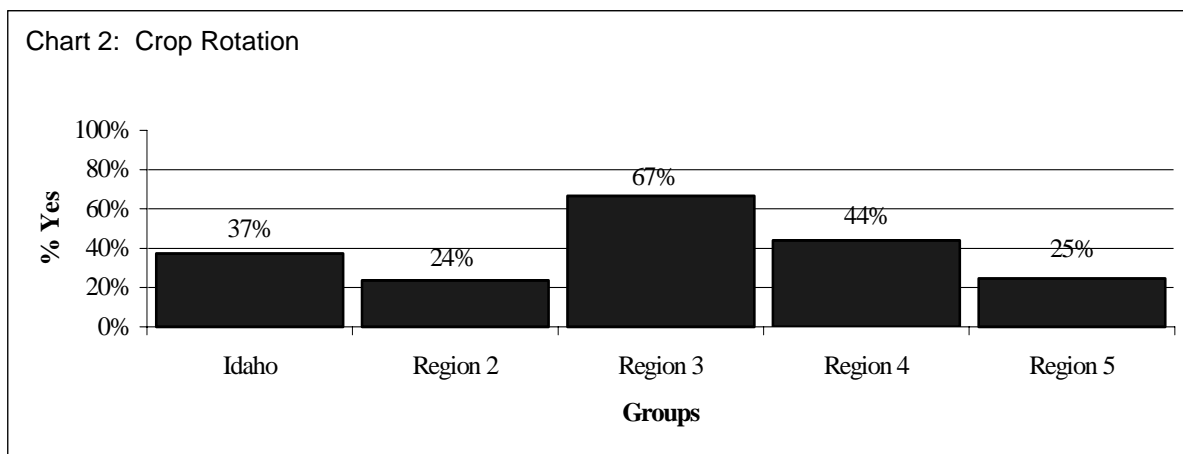
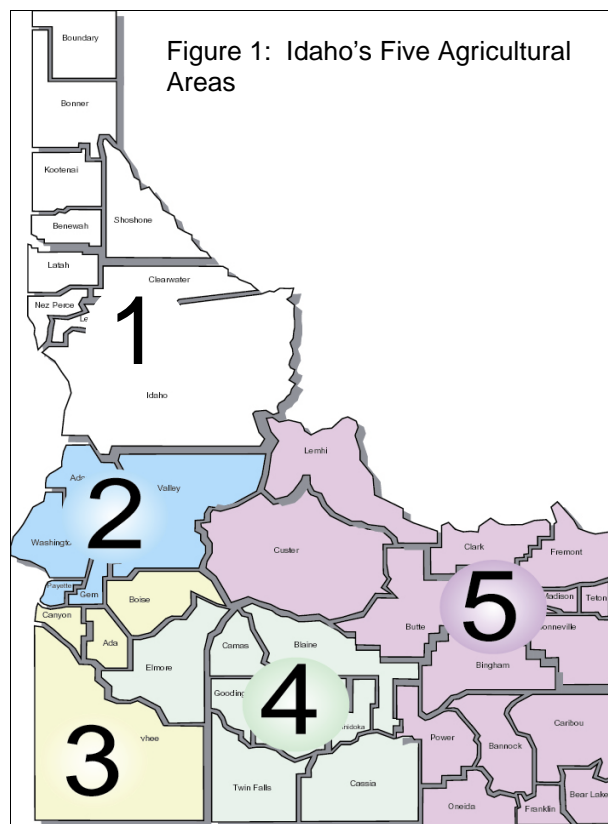
Approximately 37 percent of Idaho's farmers who responded to the survey indicated they changed the order of their crop rotation because of extreme drought conditions. The highest percentage of change came from Agricultural Area 3 which had 67% of farms changing crop rotation. This was expected due to the very low water levels in many of the reservoirs in that region. A lower percentage of farmers (24%) planted completely different crops to help reduce the effects of the drought. (See Chart 2.)

A smaller percentage (20%) of farmers participated in the Idaho Power Buyback program. This program created financial incentives for not using or limiting electricity consumption for operation of irrigation pumps. Many of these farmers (51%) also chose to either change crop rotation (1%), plant different crops (25%) or do both (25%) on those acres not involved in the buyback. As might be expected, many buyback participants (42%) opted to either plant a dry land crop or use alternative means to operate their pumps on those acres involved in the buyback (see Chart 3 on page 23). (According to Idaho Power figures, a total of 429 farmers participated in the power buyback with a total of 154,439 or 7% of all acres taken out of production. This acreage may include land on which farmers opted to plant dry land crops or use alternative means to operate pumps.)

The data also indicated that 18% of the farmers surveyed hired fewer seasonal farmworkers this year due to the drought, resulting in 9% fewer seasonal workers in 2001. Therefore, approximately 560 fewer seasonal farmworkers in the 34 counties were hired overall in 2001. This number is reflective only of the seasonal

farmworkers hired directly for the *Farmworker Diversified Crops*, *Farmworker General*, and *Irrigator* occupations. (See Charts 4 & 5 on page 23.)

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⁴ Agricultural Area 1, which consists of all the counties north of Adams and Valley Counties, was not surveyed because of the lack of need for prevailing wage information for the three job categories. Agricultural areas are developed according to factors such as geography, topography, climate, seasonality, and crops.

Chart 3: Idaho Power Buyback

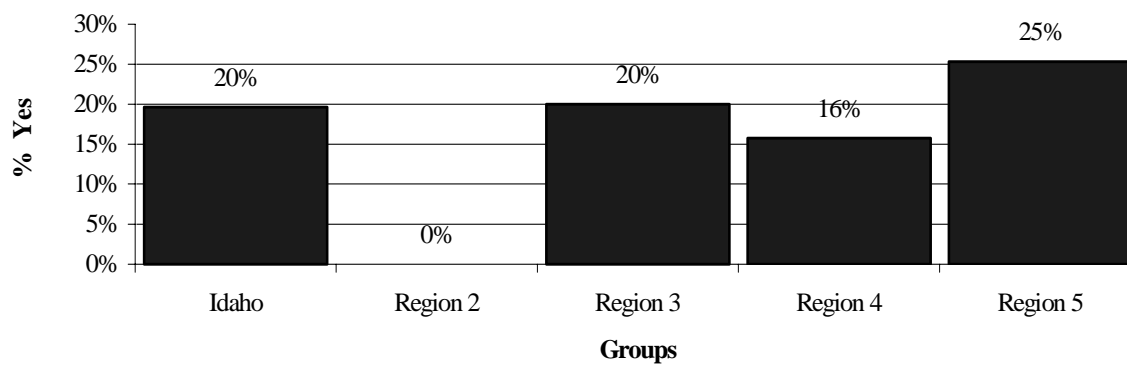


Chart 4: Percent of Farmers Who Hired Fewer Seasonal Workers

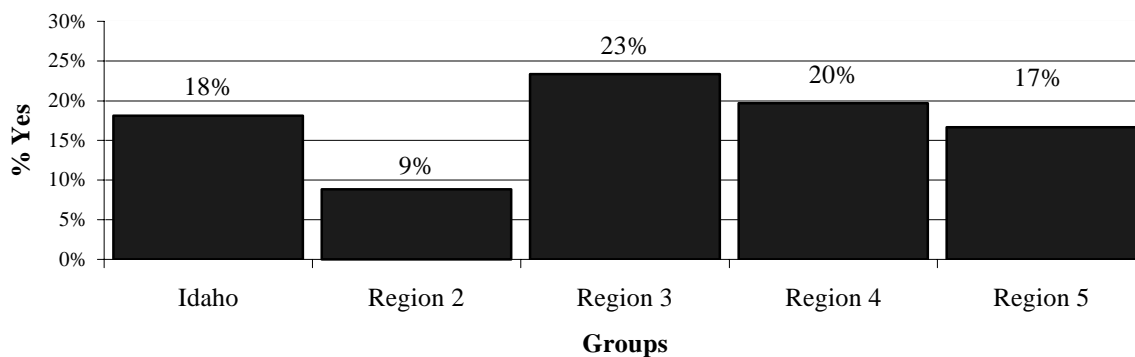


Chart 5: Percent of Fewer Seasonal Workers Hired

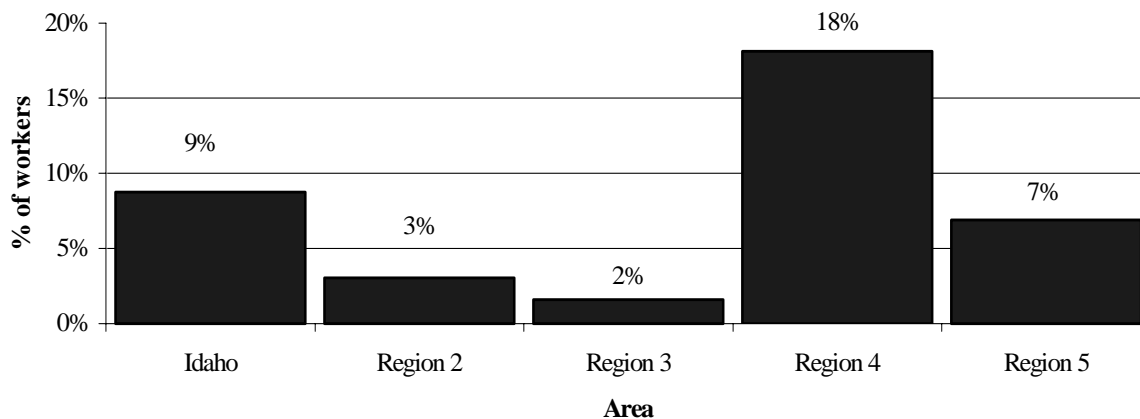


Chart 5: Caribou County 99-00

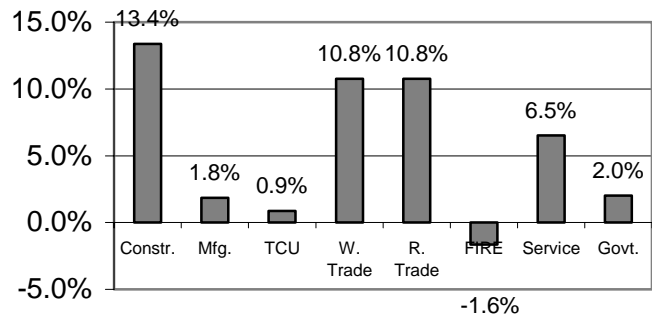


Chart 6: Franklin County 99-00

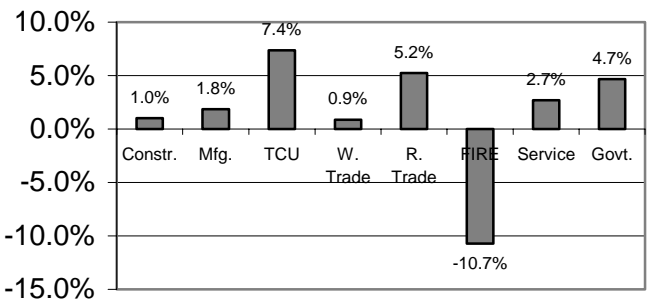


Chart 7: Oneida County 99-00

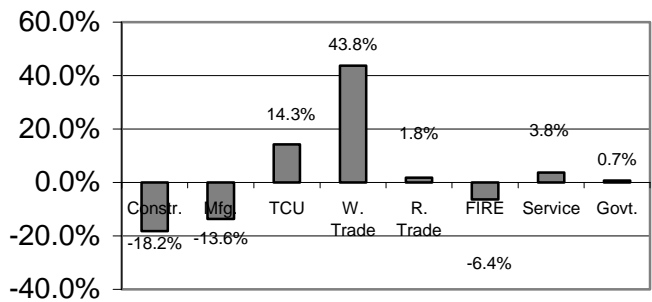
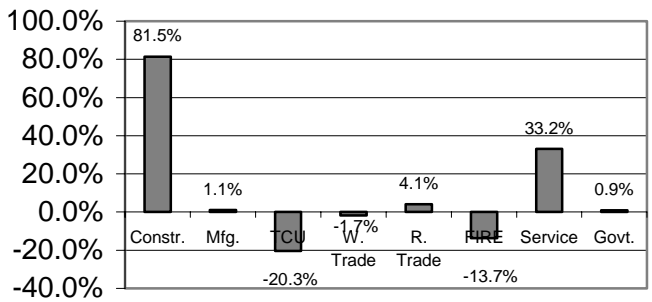


Chart 8: Power County 99-00



TCU=Transportation, Communications & Utilities; FIRE=Finance, Insurance & Real Estate; R Trade=Retail Trade; W Trade = Wholesale Trade

Glossary of Labor Market Terms

Agriculture Employment: Persons on agriculture payrolls who work or receive pay for any period during the survey week. This includes owners, operators, unpaid family members who work at least 15 hours a week, and hired laborers.

Average Hourly Earnings/Average Weekly Hours: The average total money earnings earned by production or non-supervisory workers for selected industries. The average number of hours worked by production or non-supervisory workers including overtime, paid vacation, and sick leave. The data is collected for the week including the 12th of the month.

Average Weekly Earnings: Average Hourly Earnings multiplied by Average Weekly Hours.

Civilian Labor Force: A count of non-institutional persons 16 years of age and over residing within a specific geographic area, excluding members of armed forces, who are classified as employed, unemployed and seeking employment, or involved in a labor dispute.

Consumer Price Index (CPI): A national index measuring changes over time in the price of a fixed market basket of goods and services. There are two indexes—the All Urban Consumers (CPI-U) represents the buying habits of about 80 percent of the non-institutional population of the United States, and the Urban Wage & Clerical Workers (CPI-W) represents 40 percent of the population.

Covered Employers: Employers who are subject to state and federal Unemployment Insurance laws.

Durable Goods: Also known as “hard goods” because they include items manufactured or provided by wholesalers with a normal life expectancy of three years or more.

Employed: Individuals, 16 years of age or older, who worked at least 1 hour for pay or profit or worked at least 15 unpaid hours in a family business during the week including the 12th day of the month. Individuals are also counted as employed if they had a job but did not work because they were: ill, on vacation, in a labor dispute, prevented from working because of bad weather, or temporarily absent for similar reasons.

Initial Claim: Any notice of unemployment filed to request (1) a determination of entitlement to and eligibility for compensation or (2) a second or subsequent period of unemployment within a benefit year or period of eligibility.

Labor Market Area (LMA): An area that consists of a central city or cities and the surrounding territory within commuting distance. It is an economically integrated geographic area within which individuals can reside and find employment without changing place of residence. Idaho has nine LMAs.

Metropolitan Statistical Area (MSA): An area that has either a city with a population of at least 50,000 or a Bureau of Census urbanized area of at least 50,000 and a total metropolitan area of at least 100,000. The Office of Management and Budget designates the MSAs. There are two MSAs in Idaho—Boise City (including Ada and Canyon counties) and Pocatello City (including Bannock County).

Nonfarm Wage & Salary Employment: Persons on nonfarm establishment payrolls (including employees on paid sick leave, paid holiday, or paid vacation) who work or receive pay for any part of the week including the 12th of the month. It is a count of jobs by place of work. It does not include self-employed, unpaid volunteer or family workers, domestic workers in households, military personnel and persons who are laid off, on leave without pay, or on strike for the entire reference period.

Nondurable Goods: Also known as “soft goods” because they include items manufactured or provided by wholesalers that generally last for only a short period of time (three years or less).

Seasonally Adjusted: Data is seasonally adjusted to remove the impact of regular events that occur at the same time every year such as the effect of cold weather on outdoor activities, the Christmas holiday, or the summer influx of youth into the labor market.

Unemployed: Those individuals, 16 years of age or older, who do not have a job but are available for work and actively seeking work during the week including the 12th of the month. The only exceptions to these criteria are individuals who are waiting to be recalled from a layoff and individuals waiting to report to a new job within 30 days—these, too, are considered unemployed.

Unemployment Insurance: Unemployment Insurance is a program for the accumulation of funds paid by employers, to be used for the payment of Unemployment Insurance to workers during periods of unemployment which are beyond their control.

Unemployment Rate: The number of persons unemployed expressed as a percentage of the labor force.

Weekly Benefit Amount: The amount payable to a claimant for a compensable week of total unemployment.

Weeks Claimed: The number of weeks that unemployed workers claimed Unemployment Insurance benefits.

Weeks Compensated: The number of weeks for which compensation was actually paid.